2020

EXCEL ACADEMY CHARTER SCHOOL

RHODE ISLAND

1. COVER SHEET

Name of Charter: Excel Academy Rhode Island **Charter Type:** Mayoral

Location of Charter School: To be determined **Location of Additional Schools (if applicable):**

Enrolling Communities: Providence, Central Falls, North Providence

Primary Contact Name: Arthur Kaynor **Primary Role:** Application Coordinator

Primary Contact Signature: Arthur D. Kaynor **Date:** 9/25/20

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Charter	Grade Levels Served	Enrollment	Communities Served
AY20-21 for the current charter (expansions only)	N/A	N/A	N/A
AY21-22 proposed new or expanded charter	N/A	N/A	N/A
AY 25-26 (5-years) proposed new or expanded charter	K-8	1,228	Providence, Central Falls, North Providence
Proposed new or expanded charter at-scale	K-12	2,186	Providence, Central Falls, North Providence

Signature of Charter Board Chair:

Print Name: Jorge Elorza

Organization/Title: City of Providence **Date:** 9/25/20

Name of Establishing Entity: Excel Academy Rhode Island

Signature of Establishing Entity Representative:

Print Name: Owen Stearns

Position/Title: Founding Board Member, Excel Academy Rhode Island **Date:** 9/25/20

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2. EXECUTIVE SUMMARY

Mission

Through a partnership with Excel Academy Charter Schools, a charter school operator based in Massachusetts, Excel Academy Rhode Island will provide an integrated Kindergarten-12th grade education to 2,186 students in Providence, Central Falls and North Providence. The mission of Excel Academy Rhode Island is to prepare students to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities.

Rationale, Need and Goals

In 2003, Excel Academy was founded in East Boston, Massachusetts, with a singular, but profound focus: to close the opportunity gap for low-income students of color. We set out to serve East Boston and Chelsea, communities with a growing population of children, predominantly low-income and Latinx, who have historically faced systemic barriers to post secondary success and college access.

Now, 17 years later, serving almost 1,400 students, Excel Academy's purpose remains clear, steadfast and unwavering. We believe that schools that are both rigorous and inclusive can fundamentally change life trajectories and close opportunity gaps so that no factor of identity determines outcomes. Our interest in replicating the Excel model in Rhode Island was sparked by the release of the June 2019 report of the state of the Providence Public School District conducted by the Johns Hopkins Institute for Education Policy that brought national attention on the vexing challenges facing the City's public schools. This report painted a stark picture of who is most at risk of being left behind by the current system - low-income students, minority students, students learning English, and those with learning disabilities. This is the very population we set out to serve in Massachusetts 17 years ago, and we have a consistent track record of achieving educational excellence with this very population. We seek to work with state and local education and civic leaders to redefine what is possible in public education and provide students in Providence, North Providence, and Central Falls with a transformative

education that equips them to overcome systemic barriers and sustain success throughout their lives. We will:

- Prepare students, academically and intellectually, for college.
- Equip students with the social and emotional skills needed to navigate a rapidly changing world.
- Support students to develop a strong sense of identity.

In doing so, we believe students who graduate from Excel Academy Rhode Island will be able to achieve and sustain success throughout their lives. We drive for our graduates to:

- Earn postsecondary credentials aligned to their goals;
- Find and maintain employment in fulfilling careers;
- Experience vibrant social networks and long-lasting relationships, and
- Make positive contributions to their communities.

Program Description and Approach to Teaching and Learning

Our educational plan is based on the Excel Academy model that has a track record of success in raising student achievement, particularly for differently-abled and multilingual learners. This educational model is grounded by four key drivers of success: rigor, systems, support, and joy. Excel Academy Rhode Island will use a combination of Common Core-aligned, commercially available curricular resources and internally developed curriculum to drive the academic program, and teachers will use a range of student-centered instructional strategies to promote mastery of content and skills and higher order thinking. A robust set of interventions, remediations and enrichment will support *all* students to achieve at the highest levels.

Applicant Group and Governance, Management and Organizational Plan

The applicant group includes The Honorable Jorge Elorza, Mayor of the City of Providence, the Honorable James Diossa, Mayor of the City of Central Falls, the Honorable Charles Lombardi, Mayor of the town of North Providence, Owen Stearns, CEO of Excel Academy, a Massachusetts-based charter

school operator, and Elizabeth Matson, an employee of Excel Academy and Providence resident. A volunteer Board of Trustees will be responsible for overseeing the school and ensuring it is accountable to the public and operates in accordance with all applicable state and federal laws and regulations. Management of the school's day-to-day operations will be led by an Executive Principal and administrative team. Excel Academy Rhode Island will have a contractual relationship with Excel Academy Charter Schools, a Massachusetts-based charter school operator, which will provide a range of academic, financial, and operational support and services to the School.

3. MISSION STATEMENT

The mission of Excel Academy Rhode Island is to prepare students to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities.

- ***Prepare students to succeed in high school and college*:** Our mission acknowledges that the true measure of our success is not determined by what our students achieve while they are with us, but rather when they matriculate from our program. We will graduate students who are academically, emotionally, and socially prepared for post-secondary success.
- ***Apply their learning to solve relevant problems***: For learning to be meaningful and lasting, students must make the connection between core content and skills and its application to relevant, meaningful situations that offer a broader context for learning.
- ***Engage productively in their communities***: We explicitly teach a character education program for students to understand, develop and internalize the qualities and behaviors of responsible and responsive citizens and have the intent, skills and abilities to make positive, meaningful contributions to the world around them.

Taken together, we seek to provide a transformative education that equips students to overcome systemic barriers and sustain success throughout their lives:

4. NEW STUDENT SEATS AND ENROLLMENT

Our enrollment and expansion plan calls for 2,186 seats over the course of 9 years to fully build out an integrated K-12 charter school. Specific details, including the number of students by year and grade can be found in *Attachment 1*.

The primary entry point for enrollment will be kindergarten (enrolling 54 new students the first year, 108 students the second year, and 162 students every year thereafter.) To enable another entry point for enrollment, we will also enroll a cohort of new students at 5th grade as well as backfill any vacated seats through a minimum of 9th grade.

Growth and School Size Rationale

Our growth and expansion plans for Rhode Island are informed and guided by the organizational lessons we have learned from Excel's expansion in Massachusetts from serving 220 students at a single campus to an integrated 5-12 program serving over 1,400 students. We believe that a steady growth plan that replicates the basic size and configuration of our school will lay the foundation and blueprint for success in Rhode Island. In Massachusetts, we grew at the pace of a single grade per year. We found that a slower pace of growth, rather than a swift ramp up, is critical for establishing a strong student community and culture of achievement. We believe it allows staff to focus on deeply understanding the

needs of new students as they enter the program at a steady and manageable pace and enables the development of rich and genuine relationships among staff, students, and families which are critical to creating a positive school-family partnership and achieving our mission. Thus, we will open with three grades (kindergarten, 1st grade, and 5th grade) in our first year of operation and add an additional grade each year until we have a fully integrated kindergarten to 12th grade program.

Our plans also include the addition of elementary grades (kindergarten - 4th grade) to our model. Due to the Commonwealth's statutory limitations on the number of charter seats available in our sending districts (Boston and Chelsea), we have not been able to expand to serve elementary school students in our Massachusetts-based schools. The opportunity Rhode Island presents to start the Excel model in kindergarten is appealing because research shows the significant educational disadvantages that low-income students face entering school relative to their more affluent peers[1]. We know that a student's educational trajectory begins during the young, formative years of a child's academic life, and we believe that the greatest impact we can have on a student's education is to put them on the path to college preparedness starting in kindergarten.

We have planned grade and class size configurations with the following design beliefs:

- In grades K-2, average class size will be 18 students. Classrooms will be co-taught with one teacher leading English and Social Studies and the other leading math and science.
- In grades 3-4, average class size will be 27 students which will be taught in a self-contained classroom by one teacher and a teaching assistant.
- At the middle school level, the size of each grade and classroom size has been strategically designed to work best with the School's educational program and is a best practice of our Massachusetts-based school. We are confident that our approach to building a warm, safe, and

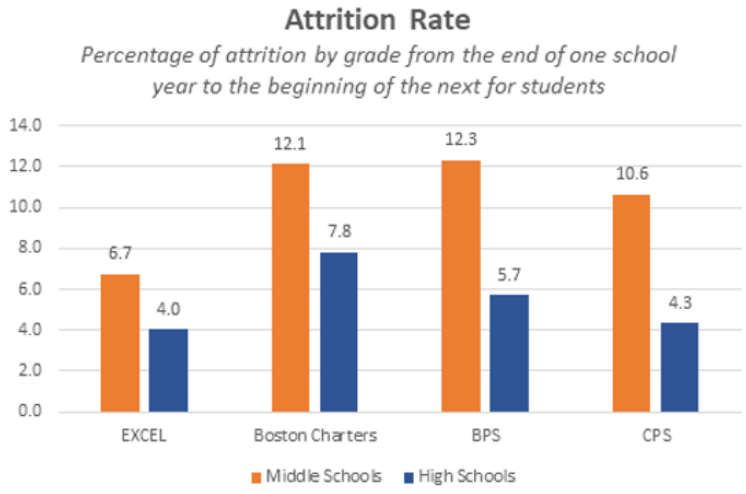
[1] Hart, B., & Risley, T. R. (1995). *Meaningful differences in the everyday experience of young American children*. Baltimore, MD: Paul H. Brookes Publishing Company

academically-focused culture allows for larger-sized classrooms - an average of 29 students per class - while enabling teachers to focus on important tasks such as differentiation, timely grading and individualized feedback.

- At the high school level, class sizes will vary by course as scheduling is done at the student level to ensure each student is pursuing their own path towards post-secondary success.

Student Attrition

Excel Academy is deeply committed to inclusivity – we fervently believe we have the moral imperative to support all students who enroll to matriculate through our full program. In Massachusetts, we have had very low student attrition (averaging 4.5% annually) and we anticipate that by using similar retention tactics, we will also see very low student attrition in Rhode Island. Our financial projections account for a modest attrition rate of 5% and we will back-fill any seats vacated up through, at a minimum, the beginning of 9th grade.



Student Recruitment

Excel Academy Rhode Island is committed to recruiting a broad cross-section of students and, building off our practices for our Massachusetts-based schools, will utilize a wide range of strategies to

ensure all families, particularly those that may be less informed about school choice options, are aware of the opportunity to enroll at Excel. Our recruitment strategies will include, but are not limited to:

- Mass media advertisements (i.e., newspaper, radio, television) focusing on outlets popular among our targeted population;
- Ad campaigns which feature a free texting service for ease of access to Excel's online application;
- Social media via organic reach and paid advertisements that promote Excel and the application process;
- Collaboration with local community partners including social service, public health, religious, and civic organizations, and businesses;
- Attendance at local community events and school showcases;
- Postings in businesses frequented by a broad range of residents.;
- Postings in organizations providing services to a broad range of families;
- In-house and externally-held information sessions, and
- Use of third-party mailhouses to distribute applications and information.

All promotional materials and application forms will be translated into the languages spoken in the targeted communities and translators will be used as needed to ensure all families can access the opportunity Excel Academy Rhode Island will present. Our commitment to being an inclusive school is genuine and we realize that requires real effort on our part to ensure our target communities know about Excel Academy Rhode Island and have access to our application materials. We have seen far too many charters take an "if we build it, they will come" approach to enrollment. Rather, our approach can be characterized as "boots on the ground" ensuring *all* families have access to our program.

Enrollment

Excel Academy Rhode Island will enroll students via a process in accordance with all applicable state charter school laws and regulations. We will execute an enrollment process that ensures equal

access for all students and is devoid of any perceived or real biases or selection. As such, the only requirement for inclusion in the lottery will be the completed application and the application will require only a bare minimum of information about the prospective student such as their name, contact information, and grade in which they are currently enrolled. The student body will be selected through an open, public lottery conducted in accordance with all Rhode Island statutory and regulatory requirements. The following is a brief description of the lottery process that will be executed:

- All applications received up to the stated deadline will be entered into the lottery.
- A non-school official, such as a local community leader or politician, will draw lottery results in a public lottery conducted by the school, to further guarantee impartiality in the process.
- If all seats are filled, and there are still remaining applicants, names will be drawn and a waitlist will be created in the order of selection.
- Families of students selected in the lottery will be provided notice and a stated timeframe, of not less than 15 days, in which the family must accept the seat.
- Waitlisted families will be informed of their place on the waitlist and provided explicit instructions for how the school will fill any vacancies during the school year.

Upon charter approval and securing of school facilities, Excel Academy Rhode Island will consult with the Commissioner of RIDE to determine if we should and can set any “lottery weights” to our enrollment process to ensure our student population is representative of the communities we set out to serve, in particular that differently-abled students and multilingual learners are fully represented in our student body. Furthermore, we would like to explore with RIDE the potential to “hold” a select number of seats open to multilingual learners who may enter the public school system in varying times in which following a strict scheduled lottery protocol would make enrollment not feasible. Lastly, in accordance with state statute, we will give lottery preference to siblings of currently enrolled students and children of school staff and founders.

5. GOALS

The charter school model is founded on the trade-off of autonomy for accountability - charter schools are afforded flexibility and freedoms in return for producing strong results. We believe that the ultimate indicator of our performance as a public school is the academic outcomes that our students achieve. We also recognize that as a public entity, we have the responsibility to operate a sound, viable, and healthy organization that is representative of, and responsive to, the communities we serve and that we should be held accountable to such standards as well. The primary measures for assessing our performance, both academically, financially and organizationally will be the indicators detailed in RIDE's *Charter School Review System Handbook*, and we intend to meet or exceed all stated targets. To complement and supplement the State's required indicators of performance, charter schools are granted the opportunity to propose additional school-specific measures of success. Upon approval, we will work with RIDE staff to identify and document additional school-specific goals that, taken together with the State's Performance Indicators, will provide a well-rounded and robust picture of our success as an organization, both academically, organizationally and fiscally. The below table is provided for illustrative purposes of the types of goals we may also use to evaluate and success our performance.

Example Goals	
Goal	**Measures**
Academic Performance Objective: *Excel Academy will deliver an academically rigorous program that prepares students for success in post-secondary endeavors.*	
Excel students will make significant and measurable progress towards mathematical proficiency.	Excel will achieve an average SGP of 75 or higher in mathematics in all grades 4-8. Excel HS will achieve an average SGP of 75 in mathematics.
Excel students will make significant and measurable progress towards reading and writing proficiency.	Excel will achieve an average SGP of 75 or higher in ELA in all grades 4-8. Excel HS will achieve an average SGP of 75 in ELA.
Excel graduates will matriculate with concrete and meaningful post-secondary plans.	100% of Excel students will graduate from Excel with a productive post-secondary plan.

	85% of students will be accepted to a 4-year college 85% of students will graduate Excel with an affordable college option.
Mission-Specific Performance Objective: *Excel will provide an inclusive school community that supports all students in their trajectory towards college and/or career pathways that will set them up for success and fulfillment.*	
Excel will attract and retain a student body representative of the communities it serves.	Excel student demographics will mirror that of its sending districts, including minority, low-income, MLL and SPED populations. Excel will achieve full enrollment annually. Excel will experience 5% or less attrition on an annual basis.
Excel students will receive supports and services to make informed post-secondary plans that set them up for long-term success.	100% of Excel students will be provided individualized college and career counseling.
Organizational Performance Objective: *Excel will establish and sustain a school community that is representative of, and responsive to, the communities it serves.*	
Parents will be satisfied with the education their children are receiving at Excel.	90% of parents will affirm their satisfaction with the quality of Excel's educational program. 90% of parents will affirm their satisfaction with Excel's efforts to engage parents in their child's education.
Excel will establish itself within the fabric of the communities it serves.	At least 1/3 of Excel's governing board will have genuine connections and roots to the communities it serves. Excel will establish and sustain genuine relationships with at least two community partners who are deeply involved and invested in our program.

6. COMMUNITY NEED AND SUPPORT

Excel Academy Rhode Island aims to target students and families who are at most risk of falling victim to the opportunity gap - low-income students, minority students, students with learning disabilities, and multilingual students. We know, from experience at our Massachusetts-based school which serves a predominantly low-income, minority population, that our targeted population historically has been, and even more so in the wake of the world's events this year, profoundly impacted by racial

and economic inequities. Since our founding, Excel Academy has set out to be part of the fabric of the communities we serve and have achieved this through strategic partnerships with local politicians, civic leaders, social service agencies, and a deep commitment to respecting, valuing, and celebrating the culture and identities of our students and families. As Excel Academy plans for replicating its model in Rhode Island, we see several commonalities among the communities served by our Massachusetts-based school and the targeted communities for a new Rhode Island school while also acknowledging the uniqueness of every community and the work that must be done to ensure Excel's Rhode Island school is reflective, responsive, and engrained in the communities we will serve. The below describes what we already know about Providence, Central Falls, and North Providence and the path we will take to deepen that learning so our schools are true reflections of the communities we serve.

Description of Targeted Communities and Student Population

Providence

Providence has a population of 179,833 people in 61,638 households. This represents a modest population growth rate of only 1.2% over the past ten years. As Rhode Island's capital and major urban center, Providence attracts a diverse population: 43% Hispanic or Latino, 34% White, and 16% Black or African American. In addition to a diverse population, Providence attracts many people from outside of the state as 29% of the city's population are foreign born and 50% of people speak a language other than English at home.

The median household income in Providence is $42,158 - this is significantly lower than the median household income across the U.S. of $61,937. Geographically wealth is concentrated in the northeastern part of the city where some neighborhoods have median incomes above $150,000. In contrast, areas in the center of Providence have some of the lowest median incomes ranging between $15,000 - $31,000[2]. The homeownership rate is 34.7% and the median home value (of an owner

occupied home) is $192,100. In Providence 26% of the population lives below the poverty line and over 35% of those under the poverty line are Hispanic[2].

In terms of educational attainment, 80% of those over 25 years of age have graduated from high school and 30% have a bachelor's degree or higher. Universities in Providence itself enroll over 25,000 students annually, the largest universities are Johnson & Wales University - Providence, Brown University, and Providence College. The university's student bodies are predominantly White. In 2017 60% of students who graduated from a university in Providence were White.

The Providence Public School District (PPSD) serves a diverse student body. The majority, 67%, of students are Hispanic, 16% are Black / African American, and 8% are White. Fifteen percent of students receive special education services and 32% of students are identified as English Language Learners. Over 85% of Providence students qualify for free and reduced lunch, an indicator of economic status. Academically, students in Providence achieve proficiency at very low rates which has prompted significant and aggressive action by local and state education leaders and politicians. The low performance of Providence students on state assessments has been widely reported. To summarize, a few key metrics provide a critical depiction of the challenges the district faces:

- Student performance lags the state in all subgroups with middle school as the grade range with the most significant gap.
- On the 2017-2018 state assessments, every grade exhibited proficiency rates lower than 20% in both math and ELA – fewer than one out of every five students achieved proficiency.[3]
- Minority students perform substantially lower than their white peers across all grades[4].
- Multilingual Learners (MLLs) have the most significant performance gap compared to their peers. Middle school proficiency in ELA and Math for MLLs is around 3%.

[2] "U.S. Census Bureau QuickFacts: Providence City, Rhode Island." Census Bureau QuickFacts, 2019, www.census.gov/quickfacts/providencecityrhodeisland.
[3] Johns Hopkins Institute for Education Policy. "Providence Public School: A Review", June 2019.
[4] Ibid.

- MLLs are far more likely to drop out of school - 26% of MLL students dropped out compared to less than 16% for their peers.
- Students with learning disabilities achieve very low proficiency rates and consistently perform worse than non-special education students in every grade[5]

Central Falls

Central Falls is a relatively small city of 1.2 square miles, a population of 19,568 individuals and 6,328 households. Despite the size, Central Falls has a very diverse population, 66% Hispanic or Latino, 21% White, and 14% Black or African American. Of the nearly 20,000 in the Central Falls community 38% are foreign born and nearly 70% speak a language other than English at home.

The median household income in Central Falls is $31,724 and the median home value is $147,800. Nearly a third, 32.8%, of the Central Falls population live below the poverty line. Educationally, 63% of the population over 25 years has graduated high school and only 8% of the 25+ population has a Bachelor's degree or higher[6].

Similar to PPSD, Central Falls serves a diverse student body. The majority of students, 60% are Hispanic, 15% are Black / African American, and another 15% are White, additionally 43% of students have low English proficiency (LEP). Over 90% of Central Falls students receive free and reduced lunch[4]. While the population and district size is smaller than in Providence, with enrollments of 2,695 and 23,955 respectively, there is still substantial need for high quality options in Central Falls. Of the City's six schools (2 Pre-K / Kindergarten, 2 Elementary, 1 Middle, and 1 HS), none are rated above two stars. 42% of Central Falls students are enrolled in 1-star schools and another 53% of students are in 2-star schools, according to the latest state ratings[7].

[5] Ibid.
[6] "U.S. Census Bureau QuickFacts: Central Falls City, Rhode Island." Census Bureau QuickFacts, 2019, www.census.gov/quickfacts/centralfallscityrhodeisland.
[7] "Central Falls, 2018-19 Report Card." RIDE Report Card, reportcard.ride.ri.gov/201819/DistrictAccountability?DistCode=04.

North Providence

North Providence is a city of approximately 6 square miles situated just northwest of Providence. 13,677 households comprising 32,686 individuals call North Providence home. North Providence is somewhat less diverse than the surrounding cities, the North Providence population is 75% White, 12% Hispanic or Latino, and 7% Black or African American.[8]

The median household income in North Providence is $53,863 and the median home value is $215,200.[5] In North Providence, 11% of the population live below the poverty line.[5] 90% of the population (25 years+) have a high school diploma and 29% have a bachelor's degree or higher.[5]

North Providence is a district of 3,585 students and has six elementary schools, two middle schools, and one high school. North Providence schools' demographics are similar to the city's and enroll a higher percentage of White students than Providence and Central Falls. Overall the district enrollment is 56% White, 22% Hispanic or Latino, and 13% Black or African American. Nearly half of the students in North Providence receive free and reduced lunch and 17% of students have an IEP.

On the most recent state tests (RICAS) North Providence students overall have relatively high rates of meeting or exceeding standards. However, there are large achievement gaps between subgroups. In particular, there is a clear need for programs that have success with students with disabilities. Of the nine schools in North Providence, six are designated for 'Targeted Support and Improvement' due to the performance of students with disabilities. Overall 27% of North Providence students met or exceeded standards on the Math test, however among students with disabilities the number drops to only 6% of students. While performance on the ELA test was higher, the gap between all students and students with disabilities is even larger. 43% of all students and only 9% of students with disabilities met or exceeded standards on the ELA test[9].

[8]"U.S. Census Bureau QuickFacts: North Providence Town, Providence County, Rhode Island." Census Bureau QuickFacts, 2019, www.census.gov/quickfacts/northprovidencetownprovidencecountyrhodeisland.

Rationale

In June 2019, the Johns Hopkins Institute for Education Policy released a report that brought national attention on the vexing challenges confronting the Providence public school system. The researchers found that:

- There is a low bar for instruction and low expectations for students.
- School culture is broken.
- Teachers do not feel supported.
- School leaders do not feel set up for success.
- Parents feel marginalized and demoralized.

For Excel, this study was far more than just a headline grabbing story of the day – it was a call to action. Based on our experience and track record in Massachusetts with a similar population, we believe Excel Academy Rhode Island is uniquely positioned to work in collaboration with state and local education and community leaders to make tangible and significant gains and impacts on the Providence educational landscape. We believe that by using our model as a guiding framework, we can work with the community to create schools that are:

- Rigorous and inclusive;
- Promote and sustain a positive school culture of achievement;
- Empower and support teachers and school leader to deliver educational excellence, and
- Engage parents as partners in their child's education.

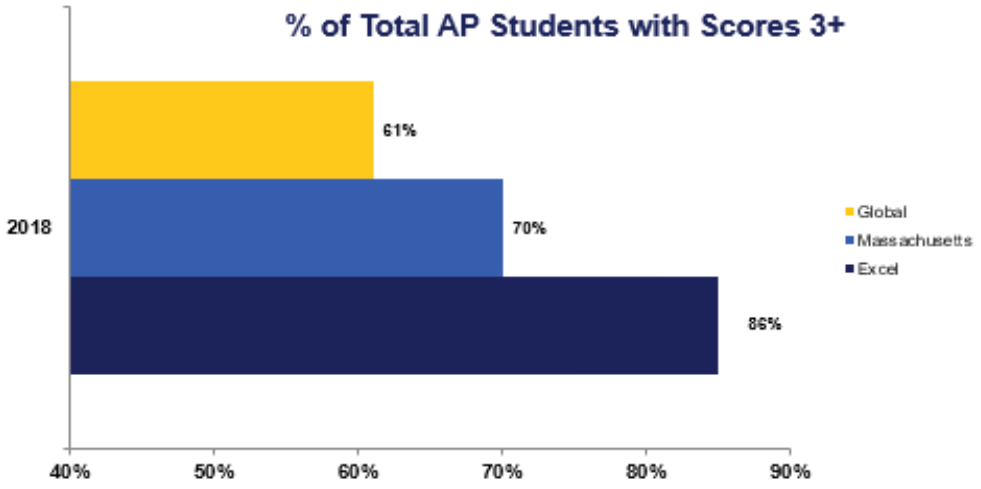
Excel's Massachusetts-based school has achieved unprecedented success as students have consistently been ranked as top performers among peer schools in the state based on the percentage of our students who are Meeting or Exceeding Expectations on state exams. And among peer charter

[9] "North Providence, 2018-19 Report Card." RIDE Report Card, reportcard.ride.ri.gov/201819/DistrictAssessments?DistCode=24.

public schools, Excel Academy students achieved the most growth in performance between 5th to 8th grade.

- Math: 31% more students are meeting and exceeding expectations in 8th grade than in 5th — compared to the state and charter peer school which decreased by 2%.
- ELA: 8% more students are meeting or exceeding state standards in 8th grade than 5th — compared to the state remaining even and charter peer groups decreasing by 8%.

Excel Academy prioritizes an approach that is both rigorous and inclusive. Each year, more of our students are gaining access to challenging, college-level course work. Approximately 94% of our 11th and 12th-grade students complete at least one advanced course, which is nearly twice the statewide average of 65%. Last year, Excel Academy doubled the number of AP courses offered and 74.5% of our senior class earned a 3 or more on at least 1 AP exam. Research shows that students who receive a score of 3 or higher on AP Exams typically experience greater academic success in college and have higher graduation rates than their non-AP peers.



Excel Academy Rhode Island will be defined not by whom we exclude, but by whom we include in our community. We believe we are uniquely qualified and able to serve students who are substantially not having success in the current system – students who are differently-abled and multilingual learners.

Excel's track record in Massachusetts in achieving significant gains for these very populations is strong. On the 2019 state assessment (MCAS):

- The percentage of our students who are differently-abled who met or exceeded expectations on the MCAS was double the state's average.
- 20% more of Excel Academy students who are differently-abled met or exceeded expectations in comparison to our sending districts.
- 10% more of Excel Academy students who are multilingual learners met or exceeded expectations in comparison to our sending districts.
- Overall the growth measure for students who receive Special Education services put Excel Academy among the top schools in the state.

As further evidence of our success, Excel's approach has been highlighted as an exemplar in meeting the educational needs of all students[10]. We believe these practices are transferable and replicable to provide educational excellence to all students in Providence, especially for differently-abled and multilingual learners.

Community Engagement and Partnerships

Our Massachusetts-based school has greatly benefited from the early and on-going efforts of our leadership team to create and sustain genuine and tangible partners within the communities we serve. At the time of Excel's beginning, now 17 years ago, our founding board included several civic and community leaders who paved a strong path for us in making real in-roads with the communities we set out to serve and created genuine avenues for soliciting and engaging community support in the development of our program. And since that time, community leaders have been consistent and active members of our governing board, we have partnered with local social service agencies to ensure access to a range of services for our students and families, and we have acted as true advocates and allies on

[10] E.B. Solomont. "Inclusion in Action" Education Next, January 28, 2020.

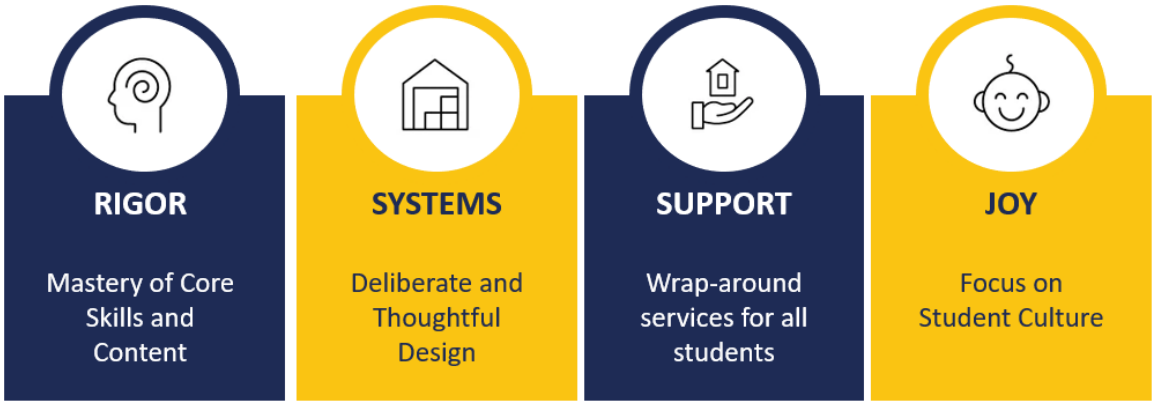
issues of importance to our communities. This is the type and depth of community engagement and partnership that we envision fostering and sustaining in our Rhode Island-based school.

Unfortunately, current (global) circumstances have hampered our ability to initiate the deep level of engagement we would have otherwise engaged in at this stage in the development of our plans in Rhode Island. The timing of the release of the charter application in Late Winter 2020 coincided with the literal shut down of our normal ways of life. And while our abilities to meet with representatives of the community have been hampered, we remain steadfast in our commitments to building strong relationships and partnerships for the betterment of our programs and the educational outcomes of our students. That said, we will not use the current situation as an excuse to back off of this important work. Rather, we will commit to re-thinking how we go about engaging the community and call upon the support we have received from local political leadership to create safe and sound strategies for community engagement. As described in Section #8 (Organizational Capacity), the Mayors of our proposed three sending districts, Providence, Central Falls, and North Providence have given their official support to this application. Letters of support for this application from the Honorable Jorge Elorza, Mayor of the City of Providence, the Honorable James Diossa, Mayor of the City of Central Falls, and the Honorable Charles Lombardi, Mayor of the Town of North Providence, are included as *Attachment 2*.

7. EDUCATIONAL PROGRAM

Guiding Principles

Our educational program is grounded in the core design, elements, and practices of our Massachusetts-based school and from studying, observing, and learning from other like-minded high performing charter schools including Brooke Charter Schools, Achievement First, Uncommon Schools, and KIPP. Like our Massachusetts-based schools, Excel Academy Rhode Island educational model will be grounded by four key drivers of success: rigor, systems, support, and joy.



Rigor: Excel Academy Rhode Island will be based on the fundamental idea that students must master core skills and content to have long-term success as learners. Students must also develop the conceptual thinking abilities to recall quickly and manipulate confidently prior skills and knowledge needed in higher-level academics. Excel's academic program will be designed to ensure students can read fluently; write effectively; perform calculations accurately; ask thoughtful questions; research, analyze and synthesize information; solve novel problems and draw insightful conclusions.

We believe that students learn best and better retain core skills and content when they apply those skills and content to relevant, meaningful situations that offer a broader context for learning. Excel's educational program will promote the development of higher-order thinking skills and provides students with the opportunity to apply learning from standard academic curricula to complex, authentic issues. Students will be encouraged to find personal relevance in their coursework and to make connections among academic disciplines. To ensure that students are able to build more sophisticated skills each year, Excel Academy Rhode Island will vertically align curriculum across grade levels around core skills in each content area.

Systems: We believe that the most effective organizations are deliberately and thoughtfully designed for success. For Excel Academy Rhode Island, this will translate into sweating all the small details that go into the daily functions of a school to maximize the amount of time that teachers can teach and students can learn. Excel Academy Rhode Island recognizes that internal operations, systems,

procedures, and practices are key levers for effectiveness and efficiency. As such, we will create and execute detailed systems and procedures that drive the daily operations of our schools. We believe fervently that schools succeed when operations succeed.

Support: Excel Academy Rhode Island is committed to serving all students and will utilize robust support structures and systems to ensure each and every student enrolled achieves success in our program. Our student support structures will include targeted remediation, intervention, and individualized programs to meet the needs of all learners.

Joy: We believe that schools that are safe for students, both physically and socially, are able to infuse a great sense of joy within classrooms which in turn creates genuine love of learning within students. Through a range of student culture drivers, we will capitalize on the unique perspectives, passions, identities, and interests of our students to foster a strong sense of culture among our school communities that bridges their academic and social experiences at school.

Curriculum and Coursework

In order to achieve our mission of preparing students for postsecondary success, Excel Academy Rhode Island will use a combination of commercially available resources and internally developed materials to develop a comprehensive research-based, Common Core aligned curriculum that ensures students gain grade-level academic content and skills and develop advanced skills necessary for college and career success. The Common Core Standards will serve as the foundation in the development of the curriculum which will be supplemented with national content specific standards such as the Next Generation Science Standards and the SSAT and the College Board's standard for pre-AP and AP curricula. The following is a summary of the curricular goals for the four core content areas of English, mathematics, social studies and science:

***English*:** The English curriculum will prepare students as confident readers and eloquent critical thinkers who have the skills, knowledge, and hunger to engage meaningfully in their communities and

solve real-world problems. Excel Academy Rhode Island students will be able to comprehend a variety of rigorous texts (including multimedia), then form and clearly communicate opinions or responses that are supported by compelling evidence. Students will develop a lifelong love of reading and a sense of joy in the discovery of their own responses to texts. Students will identify as writers and continually hone their craft to master a variety of tools and develop a unique voice to clearly communicate responses, advocate for ideas, and tell compelling stories. Students will learn from their peers, and engage in productive discussions about varying opinions, perspectives, and interpretations.

***Mathematics*:** The mathematics curriculum will develop students' processes and proficiencies in mathematics so that they are able to balance conceptual understanding with procedural fluency as they reason about unique problem situations. We view mathematics as a dynamic field of discoverable, interrelated processes and procedures as ways to make common problems easier to solve and communicate about, but not as an end in themselves. Our students will be productive problem solvers who view math as a tool and will use it to critically examine systems and structures that affect them and their communities.

***Social Studies*:** The social studies curriculum will prepare students with a global awareness of both the past and present. We aim to provide students with strong content knowledge and critical reading, writing, analysis, and speaking skills and an appreciation of the role of participatory citizenship. Our approach encourages students to deepen their intellectual curiosity by asking high-level questions about the patterns of world events; therefore, they are prepared to reach our highest expectations by engaging in their community to address real needs and take action to effect change. Students will analyze, evaluate, and communicate sound interpretation of content which helps them feel confident in navigating real world systems to affect positive change in their community.

Science: The science curriculum seeks to develop critical thinkers who display curiosity about science and apply their knowledge to make sense of the natural and designed world. Students will

regularly engage with the Next Generation Science Standards (NGSS) science and engineering practices by developing knowledge of cross-cutting science concepts as well as the core skills needed to be successful science students. As students master skills and content knowledge, they will develop a lifelong hunger to always ask "why?"

To achieve the big goals and objectives of these four content areas, Excel Academy Rhode Island will use a combination of internally developed and externally created curriculum. The middle and high school curriculum will be modeled after the curriculum created by our Massachusetts-based school. At the elementary level, Excel Academy Rhode Island will invest in purchasing high-quality, pre-written curriculum thoroughly vetted by highly respected organizations, such as Ed-Reports. Below is a brief overview of the coursework and curriculum that will be used in the core content areas:

Grade	English Language Arts	Mathematics	Science	Social Studies
K -2	EL Education	Eureka Math	Great Minds PhD Science	Internally created curriculum aligned with CC
3-4	Reading Reconsidered The Writing Revolution	Eureka Math	Great Minds PhD Science	Internally created curriculum aligned with CC
5-8	Internally created curriculum aligned with CC	Internally created curriculum aligned with CC	Internally created, aligned to NGSS	Internally created curriculum aligned with CC
9-12	Internally created curriculum aligned with CC	Internally created curriculum aligned with CC	Internally created, aligned to NGSS	Internally created curriculum aligned with CC

Grade-level scope and sequence documents define the skills and content to be taught and what students will know and be able to do as a result of a particular course of study. Included as *Attachment 3* are scope and sequence documents that detail the depth and breadth of the curriculum by content and grade level.

The core content will be further supported and supplemented by a range of special and elective coursework including music, art, fitness, and health in grades K-8. At the high school level, students will have the opportunity to explore a range of elective offerings to broaden and deepen their learning in fields including arts, performing arts, computer science, and writing.

Curriculum Development, Evaluation and Refinement

As described above, a majority of Excel Academy Rhode Island's curriculum will be internally developed. In order to strike the right balance between giving teachers autonomy and authority over curricular decisions while maintaining quality control, we will employ a content department structure whereby teachers within the same content and grade level will work collaboratively to develop, evaluate and refine the curriculum. Each content area will be led by a Department Head and each grade within that content area will be led by a Grade Level Content (GLC) chair. The Department Head and GLC chair will work with the teachers within that content area and grade level to develop the curriculum. Using a backwards planning process, the curriculum will be mapped against the Common Core Standards and any other supplemental standards to create the following curricular materials:

- Scope and Sequence
- Final assessment
- Unit assessments
- Unit plans
- Weekly plans
- Daily plans and materials

Through this model, teachers begin with the end goal– what students should know and be able to do by the end of year. Skills and content are then grouped into 4-8 week units, or courses of study that, in turn, are broken down into weekly and daily plans. In developing and refining curriculum, the content departments will ascribe to the following operational norms:

- ***Academic rigor:*** We believe that all students can achieve at the highest levels and we design and execute courses, units, and lessons that drive at mastery of content and skill.

- ***Vertical alignment of curriculum*:** We recognize that the educational experience of our students is shaped by the cohesiveness of the curriculum being taught. We deliberately and thoughtfully spiral and scaffold skills and content to maximize student learning.
- ***Collaboration*:** We work collectively, inclusively, and respectfully to accomplish more than what is possible alone.
- ***Continuous learning*:** We operate with a growth mindset and constantly push our practice to be for and do better by our students.
- ***Research and data*:** We make informed decisions by paying equal attention to what is happening in the broader education reform sphere around us and within our own classrooms. We use industry research and student data to drive our practice.

Ultimately, it is the responsibility of the Department Heads to ensure the quality of the curriculum and vertical alignment of content and skills across grade levels. Regular and ample meeting time will be provided to departments to work collaboratively to develop, evaluate and refine curriculum. Prior to the beginning of each school year, departments will work to set the scope and sequence and final assessment for the course. During the school year, departments will meet on a bi-weekly basis to develop and/or refine unit plans and assessments and collaborate on weekly and daily plans and materials. Within Department meetings, teachers will also dedicate time to analyzing assessment data that is used to inform current curricular decisions as well future refinements.

Learning Environment and Pedagogy

Classroom environment

We believe that consistency from classroom to classroom creates an environment of predictability, safety and order that allows students to thrive. Each Excel Academy Rhode Island classroom will have:

- An agenda board that states the aim of each lesson and how the aim will be achieved.

- Desk configurations that enable partner work and collaboration among classmates.
- Signage celebrating role models who share racial and ethnic backgrounds with our students.
- Tools and signage for consistent application of our behavior management system.
- College and career messaging as constant reminders for our students of the end goal.

We believe that our classrooms should have the look and feel of a thriving academic setting conducive to learning. Each classroom will be outfitted with a voluminous library as a constant reminder of the love of reading we are instilling in our students. Student work will be proudly displayed on the walls. Classrooms will be organized, tidy and kept. Bulletin boards will be used to incite interest and excitement in academic content.

Instructional practices

Excel Academy Rhode Island teachers will not not ascribe to a singular approach to instruction. Rather, we believe that the teacher toolkit must include a variety and range of practices that are able to support and reach an equally diverse range and variety of learning styles. In building the Excel Academy Rhode Island teacher toolkit, our primary focus is for instructional practices to be student-driven and place an explicit emphasis on classroom participation, dialogue, and collaboration. This approach is rooted in the idea that when students are required to carry the cognitive load, both course rigor and content retention increased, and they are able to move from dependent to independent learners[11]. Within this goal, teachers will use varied approaches to instructional delivery, including evidenced-based discussions and debates, partner and small group work, individualized academic conferences, and whole class instruction with multiple checks for understanding.

Whereas Department Heads have responsibility for the quality of curriculum, the Deans of Instruction and Curriculum (DCI) will be responsible for supporting and collaborating with their teachers to ensure instructional quality and standards mastery. Each week, teachers will submit weekly plans to

[11] Hammond, 2015; Humpreys & Parker 2015; Douglas Fisher, Nancy Frey, Russell Quaglia, Dominique Smith, and Lisa Lande, 2018

their DCI which define the curricular aims for the week ahead and instructional approaches to lesson delivery. The DCI will be responsible for giving feedback on these plans and regularly observing teachers to provide further feedback on instructional delivery. The DCI will also support teachers with analyzing achievement data and using that information to improve and differentiate instruction. As such, the DCI is able to have both a broad view across content areas and grade levels as well as the ability to hone in on the individual class and student to support teachers, through individual coaching and whole school professional development, to use their instructional toolkits to maximize the effectiveness of their teaching and meet the needs of students.

Furthermore, frequent collaboration among content teachers and Learning Specialists and English Language Learner Specialists will provide additional support for ensuring that instructional practices are meeting the learning needs of all students.

Specific Populations

Excel's program is grounded in the unwavering belief that the best public schools are those that are rigorous and inclusive and that the two are by no means mutually exclusive. Rather it is a public school's moral obligation to provide a high quality education to *all* students and create and deliver programs, supports and services to meet the diverse needs of its student body. The following details our approach for serving struggling students, students learning English, students with identified disabilities, and gifted students.

For Students Struggling Academically or Behaviorally:

Excel Academy Rhode Island holds the philosophy tha*t all* students, regardless of the skills with which they enter our program, will make transformative academic gains during their time at Excel, such that they are unquestionably prepared for college and a rigorous postsecondary opportunity. We believe that students struggle not because they want to, but because they lack certain basic skills, whether socio-emotional, academic, or organizational. When faced with a student who is not finding success in

our program, we will seek to identify the underlying root cause and then provide systematic supports to the student. There are four broad categories in which a student may struggle in a school setting:

- ***Academic:*** basic skills are below grade-level, there are skill gaps, or a documented disability
- ***Organizational:*** lacks study skills, and/or lacks executive functioning skills
- ***Social-emotional:*** may also combine with the above factors to contribute to low academic performance, and can also impact attendance
- ***Behavioral:*** usually a symptom, not the root cause, of a student's struggle

To address these broad categories, Excel Academy Rhode Island will implement a Multi-Tiered System of Supports (MTSS) model that incorporates universal screening and progress monitoring of all students, school-wide programming, and individualized, targeted interventions. The MTSS is accessed through the Child Study Team (CST) process. When a student is struggling, we believe that we must examine our own practices to systematically provide every student the additional time, support, or instructional diversity needed to learn at high levels.

The MSST's underlying premise is that schools should provide targeted and systematic interventions to any student as soon as they demonstrate the need, not only those who qualify for special education. Because learning styles and instructional practices vary from student to student, each student must receive targeted instruction – teaching practices designed to meet his or her individual learning needs and areas of weaknesses.

The MSST comprises three levels, or tiers, of instructional intervention. Tier 1, considered the baseline component of tiered instruction, is intended to ensure all students have access to rigorous, grade-level curriculum and highly effective instruction. Tier 1 supports include but are not limited to:

- Differentiated data-based instruction;
- Differentiated data-based accommodations for classwork/homework;
- Strategic placement in the classroom;

- Small group tutoring from a content teacher;
- Small group skills instruction during class, and
- Frequent check-ins.

Tier 2 interventions are intended to support students who fall below the expected levels of grade level and age-appropriate accomplishment and are at some risk for academic failure and/or display social or behavioral issues, but who are still above levels considered to indicate a high risk for failure. For these students, instructional programs focus on their specific needs. Tier 2 supports include but are not limited to:

- Ongoing Tier 1 supports;
- Skills-based small group intervention;
- Math or Literacy intervention;
- Group counseling;
- Social skills groups; and
- Behavior plans

At Tier 3, children are considered to be at high risk for failure and, if not responsive, are candidates for a special education evaluation. Tier 3 supports include but are not limited to:

- Ongoing Tier 1 & 2 interventions;
- Frequent small group pull out sessions;
- Service from a related service provider;
- Support from a Learning Specialist;
- Daily one-to-one peer instruction;
- Behavior plans;
- Modified daily schedule;
- Referral for special education evaluation; and

- Referral for outside mental health services.

Based on our experiences at our Massachusetts-based school, Excel Academy Rhode Island believes that the MSST model ensures that all students can achieve at high levels if given the correct supports and systems to meet their unique needs and learning styles.

For Multilingual Learners:

At Excel Academy Rhode Island, we believe that being bilingual is an asset that will help students succeed in college and in their postsecondary plans. We will seek to affirm and support our bilingual and immigrant families, especially in light of recent events in this country. Excel Academy commits to providing windows and mirrors for students, especially our multilingual learners (MLL), in the content we teach, to emphasize the exploration of students' multiple identities, and to seek input from families and students on services and programming. To that end, MLL students will be supported through: direct English Language Development instruction, inclusion support in content classes, and collaboration between MLL and content teachers to share strategies that will help students in language acquisition.

Identification of MLL Students:

Excel Academy Rhode Island will follow a robust system of policies and practices for the identification of MLL students. The following is a high-level summary of that system:

- ***Home Language Survey:*** Upon enrollment at Excel Academy Rhode Island, families will be required to complete the RIDE-developed Home Language Survey (sent home in multiple languages), indicating whether or not a student speaks a language other than English at home. Students whose families report that a child's first language is a language other than English will receive language screening in the event that we do not have data from previous language testing.
- ***Language Screener:*** We will use an assessment, the WIDA Screener, to determine English proficiency for these students.

- ***Additional Assessments:*** Identified students will be seen by the MLL Specialist in the first weeks of school for further screening. This screening will include a language background and school history report and reading assessments. The MLL Specialist will also observe students in the general education classroom, solicit observations from content teachers, and consult prior school records. The MLL Specialist will synthesize the above information to determine MLL status.
- ***Final Determination and Parent Notification:*** After making a final determination about MLL status, the MLL Specialist will place students in appropriate support groups and solicit feedback from content classroom teachers on the student plan. A letter of notification with the option of opting out of MLL programming will be sent home to the family.
- ***Presentation to Content Teachers:*** Once students are identified as English Language Learners and a plan is made for their support, biographies of each student will be shared with teachers and discussed at the beginning of each year to familiarize teachers with students' individual needs and supports. Teachers will also be given a list of CAN-DO descriptors for each of their MLL students to get a sense of what each student can do in each domain and should be held accountable for in the general education classroom.

Excel Academy Rhode Island will utilize a Sheltered English Immersion (SEI) program for its MLL students. All instructional staff at Excel Academy will receive relevant SEI training within the first year of employment. In addition, teachers will meet regularly with the MLL Specialist to collaborate on meeting the needs of their students. Students will also receive direct ESL instruction based on their proficiency level from a certified ESL instructor which will take place during English periods (WIDA Levels 1 and 2 only) and/or non-instructional periods (morning homeroom, WIN, DEAR, Focus.) An ESL curriculum guided by WIDA and aligned with Common Core standards will inform ESL instruction.

For Students with Identified Disabilities

Excel Academy Rhode Island will adhere to all federal and state laws and regulations regarding students with special needs, including the Individuals with Disabilities Education Act (IDEA) Section 504 of the Rehabilitation Act, and the Americans with Disabilities Act (ADA). Excel Academy Rhode Island will not discriminate against students with disabilities in its admissions process, and each and every student who enrolls at Excel Academy Rhode Island will receive a free and appropriate education (FAPE). Students at Excel Academy Rhode Island will be educated in the least restrictive environment (LRE) in an inclusive classroom to the maximum extent possible. Research shows that students with disabilities receive a better education with they are learning alongside their general education peers in an inclusive setting.

Each and every student at Excel Academy Rhode Island is held to the highest expectations based upon the child's abilities. To ensure all students achieve success within our program, students with disabilities, in accordance with their Individualized Education Plan (IEP) or Section 504 Accommodation Plan (504 Plan), will be supported in a variety of ways according to a continuum of services:

- ***Consultation between Learning Specialists, Classroom Teachers and/or Service Providers:*** Team members will meet on a regular basis to discuss the needs of students with special needs via structured weekly office hours, collaboration on accommodated assignments and frequent, informal meetings to discuss student needs. Classroom Teachers and Learning Specialists will work together to ensure students are receiving appropriate materials, classroom accommodations, and testing accommodations on a daily basis.
- ***Services provided in the General Education Classroom:*** Learning specialists will push into the general education classroom, and in collaboration with the classroom teacher, determine what supports are needed to better able the student to access the curriculum.
- ***Services provided outside the General Education Classroom:*** Students may receive out-of-class support from a Learning Specialist in a small group setting. Such services may take place during

specific time-blocks with the daily schedule (DEAR, FOCUS, WIN) that do not pull a child from content classes or as part of a co-taught content class outside the general education classroom.

- ***Related Services:*** Excel Academy Rhode Island will provide related services (such as occupational therapy, speech and language therapy and counseling) for students as identified in their IEP using specific time-blocks with the daily schedule (DEAR, FOCUS, WIN) that do not pull a child from content classes.

Identification Procedures

In accordance with Child Find, Excel Academy Rhode Island will develop and execute comprehensive systems and protocols to ensure that all students with disabilities are appropriately identified and evaluated. The below is a synopsis of that system:

- ***Referral for Initial Evaluation:*** A student may be referred for an evaluation by a parent or any person in a caregiving or professional position concerned with the student's development. When the Child Study Team (CST) determines that all efforts have been made to meet the needs of the student within the general education program, and these efforts have not been successful, a student will be referred for an evaluation to determine eligibility for special education. The school will follow a specific protocol to ensure information on all newly enrolled students is collected to support the identification of students who have been and/or may be eligible for special education.
- ***Parental Consent:*** The School will follow procedures for obtaining parental consent or procedures for when parental consent is not received.
- ***Initial Evaluation:*** Upon consent by the parent, the School will provide and/or arrange for the evaluation of the student by a multidisciplinary team.
- ***Team Meeting for Special Education Eligibility:*** Once the evaluation is completed, a Team Meeting will be called. The Team consisting of the students parent(s), at least one general

education teacher familiar with the student, at least one special education teacher familiar with the student, a representative for Excel Academy Rhode Island who has the authority to commit resources, an individual who can interpret evaluation results, other individual(s) who have knowledge or expertise regarding the student, and, if appropriate, the student. Using the evaluation, the Team will determine the child's eligibility for special education.

- ***Development of the IEP and Placement Determination:*** Upon determining that the student is eligible for special education, the Team will develop an IEP that details the academic goals for the child and specific services and supports to be provided for attainment of such goals.
- ***Parent Response to IEP:*** Upon development of the IEP, the school will be responsible for securing parental acceptance of the IEP and follow specific protocols if the IEP is rejected.
- ***Implementing the IEP:*** Upon parental acceptance of the IEP, the school will execute on the IEP.

For Gifted or Advanced Students:

The CST will be responsible for identifying students who may be gifted or advanced through regular meeting of grade level teams where the academic progress of students is analyzed and discussed. Students who are identified as gifted or advanced will be provided a variety of opportunities to extend their learning. Such opportunities include, but are not limited to, DEAR,, Focus, and WIN (What I Need) blocks.

Assessment System

As an organization with 17 years of history, Excel Academy has "grown up" in the era of statewide standardized testing and has experienced the tremendous benefits to the increasing sophistication of statewide testing systems. We appreciate and put to use the valuable data and information that can be derived by analyzing our absolute performance and growth against statewide results and those of comparable schools. We will apply these lessons learned and expertise in Rhode Island. We will also use a robust internal assessment system that provides detailed data for assessing

student performance and growth and the effectiveness of the curriculum and instruction. As described above, teachers will work in content teams to create unit assessments. These assessments, administered every 4-6 weeks, provide a valuable window into teaching and learning. Using an online assessment platform (Illuminate for English, social studies, and science; Edulastic for math), assessment results will be immediately available to teachers to assess individual, cohort and grade level performance. These data will be used by content teams to make curricular adjustments in the near-term and for long-term planning and by teachers with their instructional leader to determine which students may need additional support. Furthermore, assessment results will be sliced to examine the outcomes of our high needs learners, differently-abled and MLL students, and to properly monitor their progress in achieving content standards.

Teachers will also use more informal and immediate methods for assessing student mastery of content including quizzes, homework, and exit tickets.

Promotion and Graduation Policy

In setting our promotion and graduation policies, we believe that there should be no surprises to both the student and family when a child is at risk of not being promoted/graduating. Doing so requires us to articulate a clear promotion and graduation policy to students and families, and regularly communicate with students and families about performance.

At the elementary school level:

- Students will receive standard-based report cards that reflect progress toward mastering the standards for each grade level based on a scale of 0 to 4 (0 – no mastery, 1 – minimal mastery, 2- partial mastery, 3- grade-level mastery, 4- above grade-level mastery)
- Students who average below a 2.5 in ELA or math at the end of the year will be required to attend summer school or, in extreme cases, be retained.

At the middle and high school levels:

- Grades are assigned for each course on a 0-100% scale. Students will receive at the beginning of the year a Course Description that describes assignment types (assessments, quizzes, homework, participation) and their weight in the course grade.
- To be promoted, a student must pass all core subjects, with an average of 70.0% of higher, and not be absent for more than 15 days of the school year.
- If a student fails one core subject, s/he must attend summer school and complete the requirements of summer school in order to be promoted to the next grade level. If the student does not meet the requirements of summer school, s/he may be retained.
- If a student fails two or more core subject areas, s/he will be retained.

Graduation requirements include:

- Students must complete a full course of study: 4 years of English, 4 years of mathematics (completing at least to pre-calculus), 3 years of a foreign language, 3 years of lab science, 3 years of history, and 8 credits of electives and fitness.

For all grades, promotion and graduation recommendations will be made by teachers and final promotion/graduation requirements will be made by the Executive Principal. The school reserves the right to make exceptions to its promotion policy.

School Culture

The best schools create and sustain a culture of achievement in which students are both known and challenged. We start with the unwavering belief that students want to learn and that schools must establish an environment where a student's own desire to succeed can flourish. Toward that end, Excel Academy Rhode Island will:

- Ensure students know what is expected of them.
- Use structure, predictability, and consistency to make students feel comfortable, safe, protected and included.

This in turn will:

- Allow students to focus on their learning.
- Prepare students to become engaged citizens who follow the rules set by our communities.

In this safe, calm and orderly space, students can thrive as scholars and as people.

To define, honor and reinforce our desired school culture, Excel Academy Rhode Island will share a community code that all members, staff and students,will have responsibility to uphold. At the lower school levels, the Code of Conduct will be **PREP**: Prepared, Respectful, Engaged and Professional:

- ***Prepared*****:** As Excel Academy Rhode Island students, we come to school and class prepared to succeed. We bring our homework, supplies, uniform and right attitude.
- ***Respectful*****:** As Excel Academy Rhode Island students, we show respect to ourselves, classmates, staff and school. We are honest, kind, open-minded, and community-oriented.
- ***Engaged*****:** As Excel Academy Rhode Island students, we lean in, listen, volunteer, participate, contribute, track the speaker, read all directions and ask insightful questions.
- ***Professional*****:** As Excel Academy Rhode Island students, we stay organized, demonstrate good posture, work hard, are articulate and follow all directions and instructions.

In recognition of the developmental maturity of our students, the community code at the high school level will evolve to **PRIDE**: *Purposeful, Reflective, Inquisitive, Dedicated, and Empathetic.*

- ***Purposeful*****:** As Excel Academy Rhode Island students, we act with intention, live in the present moment, and make changes that help us grow and thrive. In this way, we discover paths that align with our passions. We understand that every choice creates pathways and consequences for the future, and seek through reflection to make purposeful choices that align with our values, goals, and that with practice, comes purpose.

- ***Reflective*:** As Excel Academy Rhode Island students, we regularly reflect on our current practices, habits, and mistakes. We welcome both positive and critical feedback while constantly looking for ways to improve.
- ***Inquisitive*:** As Excel Academy Rhode Island students, we are curious and hungry to learn! We seek joy through ideas, and we are eager to apply our learning to solve relevant problems. We participate fully in every aspect of school life, and excel in both academic and extracurricular activities.
- ***Dedicated*:** We are dedicated. We embrace challenges and overcome obstacles in order to achieve our goals. We work hard daily and act with purpose recognizing that we control our own destiny. We will not allow negative people or other outside influences distract us from what is important.
- ***Empathetic*:** As Excel Academy Rhode Island students, we deeply value each other's perspectives, and we seek to understand the values and experiences that shape each member of the community. Our commitment to empathy drives us to care for each other and to actively cultivate a compassionate and generous school community.

Our Community Conduct is only so good as the structures and systems in place to maintain it. The first step is buy-in – students must respect its importance, understand the rules, and internalize their responsibility for upholding the Community Code. This is true for our students as well as our families who are partners in our efforts in creating and sustaining a strong school culture.

The next step is enforcement. Our behavior management system is premised on the notion that students are capable of making choices. Students can choose to follow the rules, or they can choose to break the rules. There are positive motivators for when a student chooses to follow a rule or procedure and negative consequences for when a student chooses to break a rule or procedure. Thereby, students who choose not to meet the school community's clearly defined standards for reasonable and

acceptable behavior will not be permitted to disrupt the education of others. Our discipline system will have more positive motivators than negative consequences. These positive motivators can be intrinsic or extrinsic. Students who choose to follow the rules choose academic success, opportunity, positive recognition, and individual rewards. Classes who choose to support each other in meeting Excel's expectations earn recognition, privileges, and rewards. Excel's discipline policies will comply with all federal, state, and local laws and regulations, for both general education and differently-abled students.

Ultimately, we realize that consequences, rewards and structures alone will not serve our students as well as helping them learn how to make good choices. We must strive to educate students around the true costs, benefits, and future implications of their behavior choices. One indicator of success of our schools' behavioral system is if students develop a sense of accountability to themselves — to make the right decisions when no one is watching because it is the right thing to do. This education will serve our students long after they leave the structures of our school.

8. ORGANIZATIONAL CAPACITY

Establishing Entity

Excel Academy Rhode Island is an eligible proposed mayoral academy as identified in RIGL 16-77.4. The Honorable Jorge Elorza, Mayor of the City of Providence, is the establishing person of our application, and as described below, will serve as the Chair of the Excel Academy Rhode Island Board of Trustees upon approval of this application. This application is also supported by the Mayor of the City of Central Falls, The Honorable James Diossa, and the Mayor of the Town of North Providence, the Honorable Charles Lombardi. Official letters of support for this application from Mayor Elorza, Mayor Diossa, and Mayor Lombardi are included as *Attachment 2.* Excel Academy Rhode Island has filed Articles of Incorporation under Rhode Island state law (Section 7-6-34 of the General Laws of Rhode Island).

Applicant Group

The applicant group for Excel Academy Rhode Island is comprised of elected officials from our three sending districts - the Honorable Jorge Elorza, Mayor of the City of Providence, the Honorable James Diossa, Mayor of the City of Central Falls, and the Honorable Charles Lombardi, Mayor of the Town of North Providence - all of whom have pledged their support this application. The applicant group also includes Owen Stearns, CEO of Excel Academy Charter Schools, a Massachusetts-based charter school operator, and Elizabeth Matson, a member of the Excel Academy Charter School's Support Team and a Providence resident. This group has come together through a shared interest in replicating the Excel educational model in Rhode Island and providing academic excellence to all students, particularly multilingual and differently-abled students. If approved, the elected officials of this applicant group will serve, or appoint a designee to serve, in a governing and/or advising role to the School. Both Mr. Stearns and Ms. Matson will, given their employment with Excel Academy Charter Schools, provide leadership management and support to the establishment and development of Excel Academy Rhode Island. Biographies/resumes of each member of the Applicant Group are included as *Attachment 4*.

Board Development and Duties

Excel Academy Rhode Island will be governed by a Board of Trustees who will hold legal and fiduciary oversight for our Rhode Island schools. The Board of Trustees, as public agents, will ultimately be responsible for ensuring the schools operate in accordance with all applicable laws and regulations, and the Board as a whole and as individuals will comply with state Open Meetings Law and ethics requirements.

Board Member Recruitment

The Board will form a Governance Committee which will be responsible for member recruitment and ensuring that the Board as a whole has the skills, expertise and qualities required to effectively govern. Using a matrix of desired skillsets, expertise and qualities, individuals will be recruited for

service. Our primary assessment on whether an individual is a viable candidate for service on the Board is mission fit – all Board members will hold an unwavering belief that all students can achieve at the highest levels and are committed to volunteering their skill and will to advance Excel Academy Rhode Island's mission. Mission-fit candidates will also bring to bear skillsets sought including finance, real estate, education, non-profit management, governance, community organizing, strategic planning and fundraising as well as individuals who have strong connections to the communities the schools serve. Initial recruitment of board members will be conducted in collaboration with the elected officials who have put their support behind this application. Candidates being considered for Board service will conduct an interview with the Executive Principal and/or CEO as well as the Board Chair and/or Governance Chair. Candidates will be recommended for service by the Governance Committee and require a majority vote of the Board. Initial board members will serve staggered terms of 2, 3 and 4 years. Successors will serve a three-year term and the Board should comprise no less than 7 members with a target of 9-13 members total. All new members will receive thorough training on their responsibilities and duties as a member of Excel Academy Rhode Island's Board of Trustees.

Board Positions

In order to effectively conduct business and fulfill the responsibilities of a charter school board, The Excel Academy Rhode Island Board of Trustees will establish specific positions and leadership roles. Please see *Attachment 5* for a list of all board positions and proposed individuals for such positions. As noted in the Attachment, the Honorable Jorge Elorza is proposed as our Board Chair. Also included as *Attachment 6* are the resumes and/or biographies of proposed board members.

Board Oversight

In order to ensure the Board fulfills its oversight duties responsibly, the Board will conduct its business in accordance with approved by-laws (see *Attachment 7* for a draft set of by-laws) and will meet at least six times per year. The Board will also appoint task forces and/or committees that will meet more

frequently on key areas of importance for the school's growth and development. Including but not limited to facilities, finance, development, governance and an executive committee.

The Board will receive frequent management updates from school leadership on critical, school-related issues, including staff recruitment and retention, student recruitment and retention, family engagement and satisfaction indicators, student performance, and staff and student culture indicators. These updates are shared during in-person meetings and electronically.

While the Finance Committee will review, in coordination with management, financial reports quarterly and receive more frequent updates on critical issues, the full Board will have the ultimate oversight of the school's financial health and be responsible for approving the annual budget and ensuring independent financial audits are conducted in accordance with legal requirements.

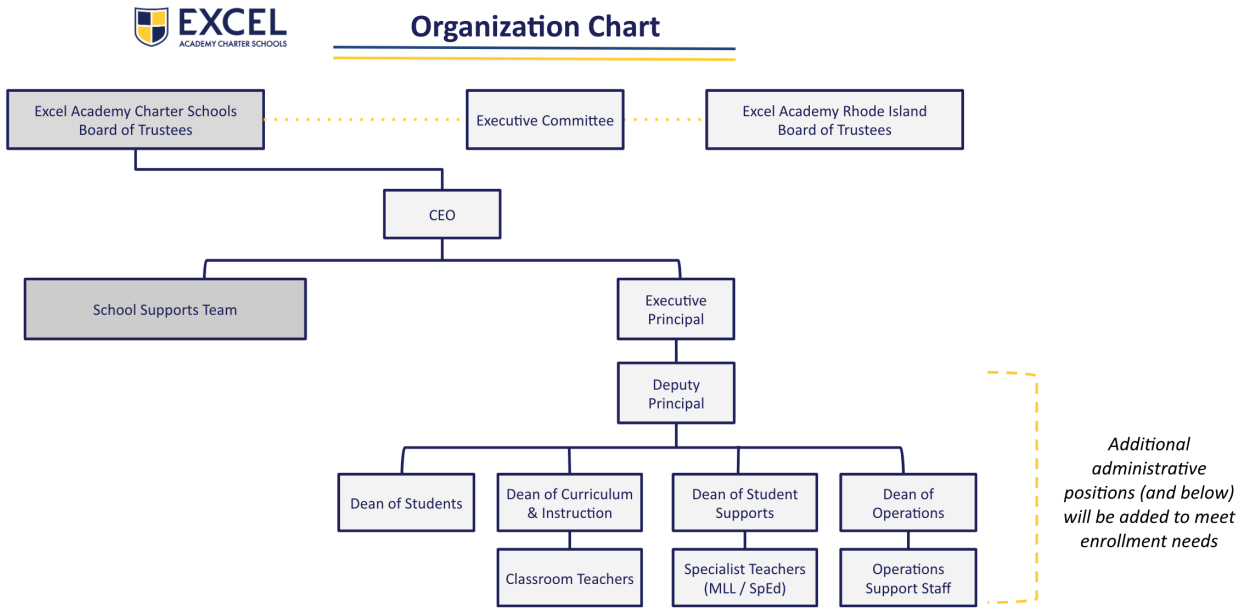
Ultimately, it is the responsibility of the Board of Trustees to ensure the school is fulfilling its mission in preparing students for post-secondary success. Thus, the Board will closely monitor the academic performance of the school through an agreed upon set of metrics which management will report on, both electronically and at in-person meetings. The Board will receive training on the various assessments and tools used by the school to measure student performance and receive data in a digestible format that can inform decision-making by the Board.

While the Board is responsible for governance issues, the school's leadership is responsible for the daily management of the school as executed and delegated by the CEO. The CEO is the sole individual reporting directly to the Board of Trustees. On a day-to-day basis, the CEO is responsible for all instructional and non-instructional responsibilities including board relations and governance, educational accountability, personnel, budgeting and finance, legal and regulatory compliance, growth strategy, facilities, and external relations. The CEO will be hired and evaluated by the national board of Excel Academy which will establish an Executive Committee, on which the Board Chair of Excel Academy

Rhode Island will co-chair. This will ensure that the Excel Academy Rhode Island Board has the proper level of input to the hiring and evaluation of the CEO.

Staffing Plans

The Excel Academy Rhode Island Board of Trustees will delegate all management and administrative responsibilities to the CEO of Excel Academy Charter Schools. The CEO, in turn, will hire and directly supervise an Executive Principal of Excel Academy Rhode Island. The Executive Principal will play a critical leadership role in managing the academic and organizational functions of Excel Academy Rhode Island.



CEO: The CEO is responsible for ensuring that all resources – financial, human, operational, and educational – are maximized to achieving the organization's mission. The CEO will serve as the external face of the organization and as the liaison to the governing board.

Executive Principal: Working in close collaboration with Excel's School Support Team, the Executive Principal is responsible for managing all aspects of the planning and start-up of Excel Academy Rhode Island. The Executive Principal will manage the administrative team and will be responsible for the overall performance of Excel Academy Rhode Island.

Deputy Principal: The Deputy Principal is accountable for the success of the academic program in which s/he leads. S/he will be responsible for ensuring the quality of education including instructional supports, services, and delivery and the professional development of instructional staff. The Deputy Principal will have authority to hire and evaluate school staff and will directly manage the administrative team of the school, to whom s/he may delegate duties. S/he will be responsible for ensuring the smooth operations of the school on a daily, weekly and annual basis and will ensure the school operates in compliance with all applicable federal, state and local laws and regulations. The Deputy Principal will report to the Executive Principal.

The Deputy Principal position will be supported by an administrative team with specific leadership duties critical to the overall success of the program:

- ***Dean of Students:*** Train students and staff on school-wide behavior management systems. Enforce student code of conduct. Teach character education classes, investigate behavior issues and execute appropriate consequences.
- ***Dean of Curriculum and Instruction:*** Manage instructional staff. Provide feedback on weekly lesson plans and observe teachers on a regular basis. Design and implement the professional development program.
- ***Dean of Student Supports:*** Manage the identification of and delivery of supports and services for special populations. Ensure the school's programs and supports comply with all applicable federal and state laws and regulations related to special populations.
- ***Dean of Operations:*** Develop and execute systems and procedures for the daily operations of the school including daily schedule, lunch routines, and non-instructional time. Manage non-instructional staff.

Instructional staff will include content and grade level teachers, teaching assistants, MLL and Special Education specialists, specialists/elective teachers. The following is a staffing chart for the first ten years of operation that identify the number of staff to be employed for each year of operation.

	Pre-Open	Launch Years								Full Scale
Staffing Projections	**SY21-22**	**SY22-23**	**SY23-24**	**SY24-25**	**SY25-26**	**SY26-27**	**SY27-28**	**SY28-29**	**SY29-30**	**SY30-31**
Executive Principal	1	1	1	1	1	1	1	1	1	1
Deputies/Administrators	1	4	10	19	29	33	38	41	44	46
Program/Operations Support Staff	0	1	2	4	6	8	9	10	11	12
Teachers	0	11	29	58	80	98	114	126	137	145
Paraprofessionals	0	1	3	6	9	10	11	11	11	11
Pupil Support	0	5	12	24	33	40	45	48	51	53
Teacher Support	0	2	5	11	15	19	20	22	24	25
Program Management	0	0	0	0	0	1	3	4	6	7
Special Services	0	3	6	13	17	21	23	24	25	25
Total FTEs	2	27	67	135	189	230	262	286	309	324

Furthermore, Excel Academy Rhode Island will benefit from Excel Academy School Support Team staff who will provide leadership and support to school-based staff. School Support staff exists to serve two main functions: (1) to provide expertise and quality control and (2) to alleviate the administration burden at the school level. To clarify decision rights and prevent overreach or under-involvement from the School Support Team, we will create and will operate within the terms of a comprehensive decision rights document which will dictate decisions that can and should be made at the school or the school support-level.

Leadership

As described above, The Executive Principal will oversee the day-to-day educational program of Excel Academy Rhode Island with ultimate responsibility for ensuring instructional quality, the integrity of the learning environment, and building and fostering strong school-family relations. A detailed job description of the position can be found as *Attachment 8*. In order to ensure that the School is led by a strong and competent individual, Excel Academy Rhode Island will conduct an extensive recruitment and interview process which will include multiple interviews with key stakeholders (Board representatives, Excel Academy staff, CEO) and performance-based interview tasks.

All administrative positions will be employees at will and will receive a one-year commitment of employment that can be terminated at any time by either party. The renewal of an employment commitment will be provided in late winter of each school year following an extensive 360-evaluation process. At the beginning of each school year, the Executive Principal will set performance goals for which s/he will be held responsible for meeting. Data, including feedback from direct and indirect reports, will be used to assess performance against these goals and s/he will receive a written, detailed analysis of their performance. The Executive Principal will be managed by Excel's CEO.

Teachers

For any organization, in any field, the best laid plans are only so good as the individuals who are charged with their execution "on the front line." The success of a school squarely rests of the quality of the teachers who must design and execute excellent lessons, hold students accountable to high behavioral expectations and academic goals, build purposeful relationships with students, support students in their emotional and social development, genuinely partner with families, and infuse a sense of joy, purpose and belonging in their classrooms. As the backbone of the program, Excel Academy Rhode Island will put tremendous care and attention to ensuring we make qualified mission-fit hires and create a work environment for teachers where they are supported on both a personal and professional level so that Excel Academy Rhode Island is a work environment where they can sustain a long-term career.

Qualities

All Excel Academy Rhode Island teachers will embody the following skills and qualities:

- An unwavering commitment to and belief in all students and Excel Academy Rhode Island's mission, including our values and educational model;
- A commitment to addressing racial and economic inequity in education;
- The ability to focus and thrive in a fast paced, entrepreneurial environment;

- Knowledge, passion and interest in the content for which they will teach;
- The ability to work effectively in a team environment and the willingness to desire to support others in doing their best work, and
- An openness to change, a willingness to problem-solve, and an interest in receiving feedback for continuous improvement.

All teachers will hold Rhode Island certification as required for the position to be filled.

Teacher Recruitment and Selection

We will hire teachers who share an unwavering commitment to educational excellence and a steadfast belief that all students can achieve at the highest levels. We will employ a robust recruitment and selection process to ensure we are casting broad and far reaching outreach in recruitment and using selection processes that result in excellent hires. Our outreach efforts will utilize more traditional avenues for Rhode Island public school teacher searches, leveraging relationships with teacher preparation programs such as Teach for America and university teacher training programs and leveraging personal networks of Board members and other institutional partners.

Our interview process will entail several steps that will allow for a deep and well-rounded assessment of each candidate: interview screen, phone/video-conference phone screen, and teaching of a model lesson and in-person interview.

We are committed to building a diverse staff that reflects the community that we serve. We will strongly encourage applications from candidates whose experiences share important points of intersection with those of our students. Excel Academy Rhode Island will not discriminate on the basis of race, color, national origin, creed, sex, ethnicity, sexual orientation, gender identity, disability, age, ancestry, athletic performance, special need, proficiency in the English language or a foreign language or prior academic achievement.

Terms of Employment

Excel Academy Rhode Island is proposing a variance to the employment terms as a mayoral academy (See *Variance* section on Page 74.) If granted, Excel Academy Rhode Island will offer teachers a one-year employment offer. This offer may be terminated by either party. Offers are renewed yearly and will follow the formal full evaluation in late winter. Teachers will be compensated based on a set salary scale that is based on experience, years of service at the school, and performance throughout the year. Excel Academy Rhode Island will offer a competitive salary, benefits, and retirement package.

Retention Strategies

Teachers are the backbone, and hiring the right people is not enough – we must also retain great teachers. We believe that there are two key strategies to teacher retention: 1) provide teachers with a positive, engaging, professional environment, and 2) commit to supporting a teacher's work-life balance in personally meaningful ways.

We will promote the idea that adult culture feeds student culture. Thus, we will put equal attention to building a strong adult culture as we do student culture. And many of the same tools and techniques that we will use to build student culture are applicable to the adults in the building as well. We will invest meaningful time to team-building so that the staff in the building connect with one another on a human level. We will establish a set of operating norms with the goal of creating a positive work environment that all staff ascribe to and commit to upholding:

- ***Mission Focus:*** Live the mission daily. Let it drive what we do and how we do it.
- ***Generosity of Spirit:*** Operate with a generosity of spirit.
- ***Weigh In to Buy In:*** Speak your mind so you can commit to the group's decision.
- ***Face to Face:*** Encourage and support one another to have face-to-face conversations, especially when necessary, to clear the air.
- ***Collaborate:*** Proactively ask for and offer help and support.

- ***Care For Yourself:*** Give yourself permission to nurture your mind and body so you can care for others while maintaining your personal well-being and sense of joy.

Our second strategy is to support teachers in creating and sustaining a manageable work-life balance. We know that teaching is a demanding job. It requires long hours and tremendous commitment that can wear on an individual's personal life and satisfaction. Our job is to think outside of the box to support teachers to develop a work-life balance – whatever that may mean specifically to them. And as that can mean specific needs to a particular person, it requires that each teacher has a manager who knows them as a person and understands their goals, both professionally and personally. Work-life initiatives that Excel has undertaken at our Massachusetts-based school include the establishment of onsite daycare for staff with children, granting teaching sabbaticals, and approving flexible work weeks and days.

Teacher evaluation

In alignment with the State's educator evaluation system, Excel Academy Rhode Island will use an internally developed model to drive its teacher evaluation process. All teachers will be evaluated against a rubric that defines the expectations for teachers in the categories of curricular planning, instruction, classroom management and personal organization. To supplement this, teachers will, with the support of their managers, develop unique professional development goals that align with their teaching trajectory at the beginning of the school year. These goals serve as an equally important metric for how teachers are evaluated throughout the year.

Teachers will be observed regularly (generally once a week) by their manager. Observations will be followed with written feedback that is aligned to the general teacher evaluation rubric and the teacher's own professional development goals, and teachers will meet on a regular cycle (generally once a week) with their manager to debrief the observation and feedback.

Teachers who are new to Excel Academy will receive a preliminary evaluation in November. All teachers will receive a full evaluation in late winter. Evaluations will be narrative and aligned to the teacher evaluation rubric and the teacher's personal professional development goals and plans.

Professional Development

Professional development will come in a variety of forms for teachers including group, individual, and personal forms of training, support, and learning. In order for teachers to share common information, knowledge and skills around topics of importance to the educational program, Excel Academy Rhode Island will dedicate significant time to full-staff professional development. Topics such as special education, MLL, and instructional strategies will be addressed in all-staff professional development sessions. Time for this form of PD will be allotted during Summit (the first two weeks of the school year for staff before students arrive,) on Friday afternoons (all students are dismissed at 1:30pm every Friday) and a dedicated day each quarter to professional development (no school for students.)

Individual professional development will be an important element of a teacher's growth and development at Excel. Every teacher will have a manager who has the responsibility to guide and support their professional development. Managers will observe teachers on a frequent basis (at least once/week for new teachers and every other week for more veteran staff) and will meet with teachers to debrief observation feedback.

Lastly, teachers will work with their managers at the beginning of each year to establish professional development goals for the year. The manager will be responsible for supporting the teacher in progressing towards these goals. Support may take a variety of forms including attendance of a conference, seminar, or course, observations at other schools or programs, or direct coaching.

Voice in Decisionmaking

As mentioned above, the adult culture at Excel Academy Rhode Island will be guided by a set of operating norms that all staff will honor and uphold. A key element of these is the norm of "weigh in to buy in," as it is a critical path for teachers to have a genuine voice in decision making. First, this norm explicitly implies that teachers will have a voice in decisions that impact the school and that teachers should freely and openly share their feedback, observations and opinions. It also suggests that teacher feedback, observations and opinions will be solicited by leadership and genuinely listened to and considered. We believe that by living our norms, teachers will have a genuine voice in decision making.

Furthermore, we will designate at least one seat on the governing board to be filled by a staff member. Having a staff presence on the Board will provide the collective group valuable insight to the day-to-day workings of the school and provide an opportunity for staff participation in the governance of the organization. Nominations for service on the board will be solicited from school leadership and the Board Governance Committee will screen and nominate individual(s) for service on which the full Board must act.

Management Organizations and Other Essential Partners

With headquarters in East Boston, Excel Academy Charter Schools is a non-profit organization with articles of incorporation in Massachusetts and will provide support services to Excel Academy Rhode Island in the form of academic leadership and support, financial management, operational infrastructure and human resources including recruitment. Excel Academy Charter Schools was founded in 2003 and currently serves over 1,400 students grades 5-12. This application is the only plan for replicating the Excel model. The most recent financial audit for Excel Academy Charter Schools is included as *Attachment 9*.

Our flagship middle school achieved impressive results early on and by its fourth year of operation, was recognized as one of the top public middle schools in the state of Massachusetts. In 2010, the Massachusetts Legislature passed a bill that granted additional charter seats prioritizing the growth

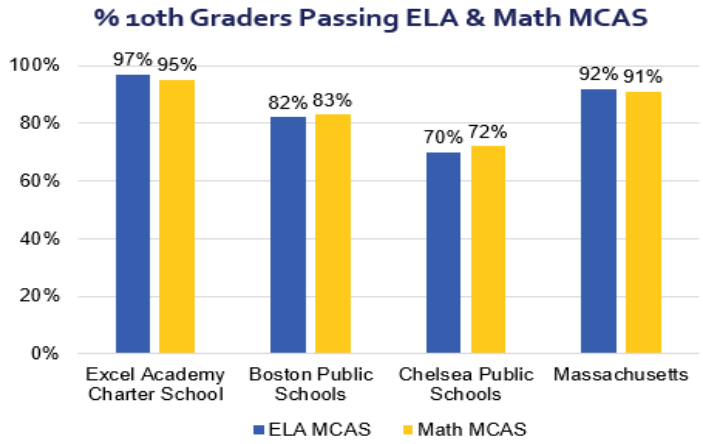
of existing schools with a proven track record of success. Excel Academy applied for, and was awarded, a charter to enable the addition of two middle school campuses and the expansion of our program through high school. Excel's growth from a single site school to three middle school campuses feeding into a single high school program is proof that quality does not need to come at the expense of quantity and educational excellence can indeed be replicated and scaled.

Excel Academy Charter Schools is governed by a Board of Trustees which is Chaired by Ben Howe, an entrepreneurial business leader and educational philanthropist. Owen Stearns is the CEO of Excel. Owen was a founding member and Board Chair of Excel's flagship school and has served as the organization's CEO for 7 years.

Our Massachusetts school has a strong record of achievement. Excel Academy students have consistently been ranked as top performers among peer schools in the state based on the percentage of our students who are Meeting or Exceeding Expectations on the Massachusetts Comprehensive Assessment System (MCAS):

- Overall, our schools perform better on the state's MCAS than 72% of middle/high or K-12 schools statewide.
- Excel Academy students show more growth from 5th to 8th grade on the MCAS than any peer charter public school.
- Excel Academy is beating the odds for how students grow in MCAS performance from 5th to 8th grade. Among peer charter public schools, Excel Academy students show the most growth from 5th to 8th grade on the MCAS.
    - Math: 31% more students are meeting and exceeding expectations in 8th grade than in 5th — compared to the state and charter peer groups decreasing by 2%.
    - ELA: 8% more students met or exceeded expectations in 8th than 5th — compared to the state remaining even and charter peer groups decreasing by 8%

- 20% more of our students with disabilities meet or exceed expectations on the MCAS in the 8th grade in comparison to our sending districts.
- 10% more of our students who are English language learners meet or exceed expectations on the MCAS in the 8th grade in comparison to our sending districts.



Excel Academy provides an unparalleled post-secondary success support program through our College Access and Post-Secondary Success team. Since our first students graduated from 8th grade, we have provided robust support and counseling services to our alumni to ensure they succeed in high school and their post-secondary endeavors. Today, eight full-time staff members work with our students in middle school, high school, and beyond high school. Excel Academy's graduates are achieving at high levels, especially compared to similar demographics nationally.

- 94% of students from our first six middle school graduating classes have graduated from high school or earned their equivalency certificate (GED or HiSET)
- 76% of the high school class of 2015 (Excel Academy Class of 2011) matriculated into a 2- or 4-year college/university.
- 65% of the alumni from our first six classes have graduated from or are currently enrolled (persisting) at a 2- or 4-year year college/university.

- The 6-year college completion rate for Latino males from the Boston Public Schools Class of 2005 was 26.5%.
- Nationally, fewer than 10% of students from low-income families graduate with a bachelor's degree within six years.

The Excel Academy School Support Team will provide a range of leadership, support and services to the Rhode Island-based school, including:

Sample Support Team Services	
Academic	- Curriculum - Assessment system - Data analysis - Professional development
Financial	- Financial systems and protocols - Annual budget development and monitoring - Accounts payable and receivable - Annual audit management
Operational	- IT systems - Vendor management including food service, custodial and IT - Human resources including payroll and benefits

Included as *Attachment 10* is a draft term sheet that details the proposed relationship and business arrangement between Excel Academy Charter Schools and the Rhode Island-based school, including the management fee.

Family-School Partnership

The families of our students are, obviously and unquestionably, one of our greatest resources in supporting our students along their educational trajectory. When schools and families are aligned, students benefit. Most tensions between schools and families come from a lack of communication on the part of the school and/or a lack of buy-in from families. Thus, we believe that it falls on the school to fully invest families in our approach and program and maintain frequent communication with families. Concrete practices for doing so, include but are not limited to:

- Parent orientation to explain the "why" behind our approach;
- Regular communication, including email and phone calls, to communicate constructive and equally important, positive messages around a child's academic and behavior progress, and
- Detailed performance reports, including weekly summaries, mid-term progress reports, and end-of-term report cards, and formal parent conferences that can inform and enable dialogue between teachers and families on a child's educational goals and progress.

Excel Academy Rhode Island will put in place both informal and formal structures for gathering data on parental satisfaction. Informally, we will have an "open door" policy and create an environment where parents feel welcomed and that their voice is important and heard. This will be accomplished through open communication between parents and staff, including the School's administration. Parents will have direct lines of communication, through phone, email, and in-person meetings, with staff and administration, and parents will be encouraged to share concerns, feedback and constructive criticism on the School's program, staff, and operations. Furthermore, we will host a range of parent-focused meetings which provide venues for parents to share their satisfaction with the School's program, staff, and operations.

Formally, each spring Excel Academy Rhode Island will administer an anonymous survey where parents are asked to rank and comment on their satisfaction with the School's program, staff, operations and results and the quality of education their child has received. Results of the parental satisfaction survey will be shared openly with the Board, staff, and public and will be used by Excel Academy Rhode Island to continuously refine its programs.

9. FACILITIES

Facility Plans

We are in the very initial phase of searching for a suitable facility or multiple facilities and will launch a comprehensive search upon preliminary charter approval. Our search will focus on finding and

securing facilities with adequate space for the target enrollment model and that are geographically proximate to each other. Understanding the complexity of identifying facilities that are large enough and provide a safe learning environment for children, Excel Academy Rhode Island will pursue a three-pronged approach and partner closely with the District and community members to creatively think about spaces. Excel Academy plans to conduct a search for:

- ***Vacant Diocese buildings:*** As a number of Diocese schools in the Providence area have closed, this has presented an opportunity to secure sites that are already set up to operate as schools.
- ***Commercial buildings that can be renovated into school sites:*** The current real estate market presents an opportunity to secure private commercial properties that have high capacities at a lower cost. While this may require significant time for collaborating closely with RIDE and renovating the sites to ensure they are in compliance with environmental codes for school sites and create positive learning environments for students, this approach is viable given our experience in commercial sites in our Massachusetts-based schools.
- ***Available space in District buildings, in partnership with PPSD:*** Excel Academy also plans to work closely with PPSD to identify any unused space in District buildings. Excel Academy is open to co-locating with District sites and would look forward to a deeply collaborative relationship with a co-located District school.

Facility Specifications

As an organization, Excel Academy has significant experience working with a variety of property types for the purposes of housing our schools. Of our four Massachusetts-based campuses, two are in leased commercial spaces, one is in a renovated former catholic school building, and our high school program is housed in new construction. Based on this range of facility types, we have developed a strong vantage point on what is needed facility-wise for our educational program to succeed and how we can

use space strategically, creatively and efficiently to deliver educational excellence. The below table, for illustrative purposes, outlines the basic needs for a fully enrolled K-4 facility:

Basic Facilities Needs						
	Year 1	**Year 2**	**Year 3**	**Year 4**	**Year 5**	**Year 6**
Number of Students	108	270	486	648	756	810
Number of Classrooms	6	12	20	24	28	30
Sq ft/per student	125	125	125	125	125	125
# of community spaces	1	2	3	3	3	4
Sq ft/community space	1,500	1,500	1,500	1,500	1,500	1,500
Number of offices	2	6	8	9	10	11
Sq ft/offices	500	500	500	500	500	500
Teacher workrooms	1	1	1	1	1	1
Teacher workroom/ sq ft	950	950	950	950	950	950
Bathrooms	3	4	6	7	9	10
Bathroom /sq ft	1,000	1,000	1,000	1,000	1,000	1,000

Any facility we consider will need to have space for the proper preparation and/or storage of student meals and we will work closely with RIDE to ensure compliance with all laws and regulations related to food and safety. Furthermore, we will work with RIDE to assess the transportation scenarios of any proposed facility to ensure the safety of students.

Facility Assurances

Once a facility/facilities are identified, Excel Academy will ensure that the RIDE Charter School Office is informed of our plans and provide the Office all pertinent documents, including draft lease or purchase agreements and will seek guidance from the Office and any other governmental entities to ensure we have full understanding of our requirements and responsibilities in relation to school facilities. It will be the responsibility of the School Support Team's Managing Director of Operations to research and maintain accurate information on all facilities-related state and local laws and regulations. Such information will be shared with the Board of Trustees and Executive Principal when securing a facility and with the Deans of Operations once a facility is secured.

Facility Oversight and Management

As the holder of the charter, the Board to Trustees is ultimately responsible for ensuring that the program is housed in suitable and safe facilities that are financially feasible for the organization. The Board will work in close collaboration with management to assess the viability of any proposed school facility. Once the facility is secured, the Board will hold management accountable for ensuring the ongoing quality and safety of the school facility.

Daily facilities-related operations and maintenance issues will be managed by the Dean of Operations. The Excel Academy School Support Team, specifically the Managing Director of Operations, will provide leadership, support, and guidance to the school-based Dean of Operations to ensure quality control and capitalize on any economies of scale that can be achieved. We will utilize a service for daily cleaning and will contract with local providers and vendors for maintenance.

10. OPERATIONS

We believe that the best schools design, develop, and execute operating systems and procedures that maximize a teacher's ability to teach and a student's ability to learn. As such, operations that create an orderly and safe school environment will be at the core of the Excel Academy Rhode Island.

Health and School Safety Plans

Excel Academy Rhode Island will be responsible for the safe operation of our school and the welfare of our students and staff. We have detailed documents that dictate our policies, protocols, and practices in relation to health and safety for our Massachusetts-based school. To ensure full compliance, we will consult with all local and state laws, regulations, and guidance in developing health and safety plans for our Rhode Island-based school.

We will employ school nursing staff, certified within educator certification regulations, who will process student health records, arrange required vision and hearing screenings, and administer any regular student medications. We will also employ counseling to support the mental health of our students and will outsource occupational and physical therapy, and psychological and behavioral testing and counseling on a student-need basis.

Food Service and Nutrition

In accordance with applicable federal and state laws, Excel Academy Rhode Island will provide breakfast and lunch during the school day and will participate in the free and reduced lunch program. The school will contract with a food service vendor to provide healthy meals and snacks for our students. We currently use Revolution Foods to provide meals to our Massachusetts-based campuses and will explore this option and comparable vendors for Rhode Island.

Transportation

Excel Academy Rhode Island will ensure all students have a safe and reliable source of transportation to and from school, including but not limited to securing a transportation vendor to bus students to and from school. If school buses are utilized, Excel Academy will set explicit rules for and monitor behavior on the school buses to ensure the physical and emotional safety of our students to and from school.

Human Resources

Excel's Massachusetts-based school utilizes a full range of internal and external expertise that provides services to the organization in the form of human resources, payroll, and purchasing. Once approved, Excel Academy Rhode Island will conduct a full audit of such services to make decisions about whether to add to the existing systems or whether other options would provide better services. Excel's School Support Team, specifically the Managing Director of Operations and Chief Financial Officer, will be responsible for leading this audit and will make recommendations to the Executive Principal.

Information Technology Plans

Excel's approach as a data-driven organization requires robust and real-time tracking and analysis of a range of student data. We currently use several information technology systems to meet these needs:

- PowerSchool SIS: to maintain accurate records on student information and attendance.
- PowerSchool SIS and Dean's List: to track academic grades and create progress reports and report cards.
- Dean's List: to track student behavior.
- Edulastic and Illuminate: to analyze internally-developed assessments and analyze student performance.
- GoalBook: to track special populations data.
- Schoolzilla: to analyze academic data.
- Torsh: to support teacher observations and feedback from administrator.
- Zoom: for remote classroom instruction.
- DocuSign: to gather signatures from families.
- ADP: to manage our HR systems.
- Jobvite: for staff recruitment.
- QuickBooks: for accounting.

Once approved, Excel Academy will conduct a full audit of such systems to make decisions whether to add Excel Academy Rhode Island to the existing systems or whether other options would be better suited. Excel's Academy School Support Team, specifically the Managing Director of Operations, will be responsible for leading this audit.

11. FINANCE AND BUDGET

Financial Plan
Attachment 11 for Budget

Budget Narrative

Excel Academy Rhode Island's economic model is carefully constructed to ensure the long-term financial health and sustainability of the School and to empower the School's leadership to meet the needs of its staff and students with efficiency, rigor, and flexibility. Excel Academy Rhode Island benefits from the experience of Excel Academy Charter Schools which has founded and sustained a fiscally healthy organization for over 17 years, as further evidenced by our most recent financial audit (included as *Attachment 9*). Our five-year budget for Excel Academy Rhode Island can be found as *Attachment 11*. Below is a summary of the values, rationale, and assumptions that drive our economic model.

Funding Sources

- ***Public Revenue:*** The majority of Excel Academy Rhode Island's revenue is derived from local and state aid and federal funding. Public revenue projections are based on reasonable enrollment forecasts and an enrollment model that maximizes our ability to deliver exceptional academic programming. Average local aid per pupil is assumed to be $4,550 and average state aid per pupil is assumed to be $11,626.
- ***Fundraising:*** Excel Academy Rhode Island is committed to building a school operating model that is sustainable at scale on public revenue, not including start-up costs, investments that may be necessary to secure suitable facilities, and expenses in support of extraordinary programming

such as our College Access and Post-Secondary Success (CAPS) Program. Excel Academy Rhode Island's revenue projections anticipate private grants as well as funding under the Charter School Program Grant (CSP) to support start-up costs, such as Year 0 staffing and facility expenses.

- ***Reimbursements*:** Excel Academy Rhode Island's proposed model assumes food services reimbursement at a rate of approximately 70%. This is a conservative assumption given our experience driving substantially higher rates of reimbursement in our existing Massachusetts school through rigorous operational efficiency.

Expense Assumptions

- ***Projections:*** Excel Academy Rhode Island's projected expenses are informed by Excel Academy Charter Schools' actual average costs in each category, research to understand potential differences between a Massachusetts-based and Rhode Island-based model, and conservative assumptions about potential needs of the school in each budget category. Where applicable, expenses are scaled on a per-pupil or per staff-member basis.
- ***Inflation:*** Because revenue projections are flat year-to-year in the five-year budget model, expense inflation assumptions are not reflected. In our long-term economic modeling we assume 1.5% general cost inflation and 3% general staffing cost inflation, and we apply more nuanced inflation assumptions where applicable.
- ***Staffing:*** Salaries and benefits represent the largest driver of expenses in our budget. The Excel Academy Rhode Island staffing model assumes competitive market rates for each position and is informed by our experience successfully operating our Massachusetts school. Salaries are projected in the following ranges by position type and depend on experience and qualifications:
    - Deputies, Deans, and Admin.: $60k - $100k
    - Teachers, Student Support Staff, MLL Specialists: $42k - $80k
    - Operations Support Staff: $40k - $55k

    - Fellows, Substitutes, Paras: $35k - $45k

- ***Purchased Management Services:*** As detailed previously, a management fee will cover a range of comprehensive leadership and support services provided to Excel Academy Rhode Island in the following areas. The fee is expected to decrease over time as the school grows to scale, consistent with the experience of our Massachusetts school. Several categories of the budget indicate $0 in projected expenses because they will be covered by the management fee. These include Insurance (non-employee), Legal, Development, Governance, and Business Operations.
    - ***Academic:*** curriculum, assessment system, data analysis, professional development
    - ***Financial:*** financial systems and protocols, annual budget development and monitoring, accounts payable and receivable, annual audit management, insurance
    - ***Operational:*** IT systems, vendor management (food service, custodial, IT), human resources including payroll and benefits, staff recruitment, legal
- ***Programmatic and Instructional Expenses:*** Projected expenses are informed by our current model in Massachusetts, as well as research on similar schools in Rhode Island.
    - ***School Office:*** Assumes $133/pupil for expenses such as printing, postage, office supplies, telecommunications, and copiers.
    - ***Information Management and Technology:*** Assumes $273/pupil for expenses such as non-pupil use IT including hardware, software, and data processing.
    - ***Pupil-Use Technology, Hardware, and Software:*** Assumes $111/pupil for expenses such as student IT needs including computers, software, and related technology.
    - ***Extracurricular:*** Assumes $336/pupil for expenses such as equipment, materials, and transportation for extracurricular purposes such as athletics, arts, field trips, student culture, and enrichment.

- ***Student Services, Outreach, Recruitment:*** Assumes $37/pupil for expenses such as translation, interpretation, and other expenses related to family engagement and parent outreach.
- ***Academic Interventions:*** Assumes $212/pupil for expenses such as SPED and MLL services.
- ***In Service, Staff Development, and Support:*** Assumes $110/pupil for expenses such as school-based professional development and staff culture.

- ***Facilities:*** Our budget model assumes upfront renovation, capital improvement, or lease costs that will be amortized over multiple years and partially offset by grant funding. These assumed costs are the starting point for a rigorous facility planning process that will begin after pre-approval of our application. We look forward to working with RIDE and the Cities of Providence, Central Falls, and North Providence to arrive at a plan to secure suitable facilities for the future students and staff of Excel Academy Rhode Island and intend to bring our own private fundraising capabilities to those conversations.
- ***Operational Expense Categories*****:** Expense projections such as utilities, food services, building upkeep and maintenance (which includes custodial services), safety, and transportation conservatively represent the higher of either our actual average expenses in Massachusetts or average expenses in Rhode Island for similar schools.
- ***Contingency:*** 4% of revenue is reserved for contingencies in the first two years, 3.5% in the third year, and 3% in the fourth and fifth years.

Financial Assurances and Management

In order to fulfill their fiduciary obligations, the Board of Trustees will be responsible for ensuring that an annual audit is conducted by an independent firm and the Board will annually approve the

School's operational budget. As a public entity, the Board will be responsible for ensuring that the school complies with all requirements under the Office of Municipal Affairs and the State Auditor General.

On a day-to-day level, the finances of the School will be managed by Excel's School Support Team, specifically the Chief Financial Officer. The CFO will have responsibility for collaborating with the Executive Principal to recommend an annual budget to the board and will put in financial procedures and practices for monitoring revenues, expenses and cash flows on a quarterly and monthly basis. A detailed set of fiscal policies and procedures will stipulate how the finances of the school are managed and monitored including the roles and responsibilities of all financial management duties, including the content, frequency, and process of reporting and reconciling bank accounts and ledger books for all financial transactions in the school. The manual will also cover processing of cash receipts and disbursements, payroll and benefits, expense reports, inventory management, petty cash, purchasing of services and procurement of goods, and budgeting and budget analysis. All spending will comply with the procedures outlined in this manual as well as the approved budgets.

12. SCHEDULE AND CALENDAR

There is extensive research on the positive impacts of extended learning – e.g. a longer school day and school year – on student performance. As detailed below, our daily and weekly schedule and school year calendar provide a longer school day and year than the state minimum requirements. We do recognize that longer school days and year can place additional pressure on teachers and staff and thus we have designed, as described below, a teacher schedule and retention plan so that staff can envision and sustain a long-term career at the organization.

Daily and Weekly Schedule

For all grades, the school will provide a minimum school day of 7.5 hours Monday – Thursday and a minimum of 5 hours on Friday. And while there will slight adjustments and modifications at the

three levels (elementary, middle school, and high school), there are several characteristics to the daily and weekly schedule that are core to our program and remain consistent:

- Morning meeting/homeroom/advisory: this is an important element of our program to build culture and community and is used to instill in students a sense of belonging and inclusion.
- Minimum of 250 minutes of instruction daily in core content to provide the time and focus necessary to gain mastery of a rigorous, college-preparatory curriculum.
- Dedicated blocks of time daily for intervention, remediation and enrichment that can be tailored in response to the specific needs of individual students.
- Dedicated time enrichment activities (Friday schedule) that enhance a student's learning beyond core course offerings.

For illustrative purposes, below is a sample schedule for a second grade student:

7:45 - 8:00	Priority Setting for the Day
8:00 - 8:15	Morning Meeting
8:15 - 9:15	Reading Workshop
9:15 - 9:30	Vocabulary
9:30 - 10:15	Writing Workshop
10:15 - 10:30	Snack and Brain Break
10:30 - 11:00	Science/Social Studies
11:00 - 12:00	Computer Science
12:00 - 12:30	Lunch
12:30 - 1:30	Math/Math Centers
1:30 - 1:45	Read Aloud
1:45 - 2:00	Snack and Brain Break
2:00 - 2:30	Recess
2:30 - 3:15	Art/Music/Dance

3:15 - 3:45	Word Study Center
3: 45 - 4:00	Closing

On Fridays, we will operate a condensed version of the above schedule with Enrichment running from 12:30 - 1:30pm, after which students will be dismissed.

For illustrative purposes, below is a draft schedule for a 8th grade student:

8:00 - 8:20	Community Circle/Morning Homeroom
8:20 - 9:10	Math
9:10 - 10:00	Science/Social Studies (half year courses)
10:00 - 10:15	BREAK
10:15- 11:05	English
11:05 - 11:55	Math (elective once/week)
11:55 - 12:25	Lunch/Recess
12:25 - 12:55	DEAR/WIN
12:55 - 1:45	Science/Social Studies
1:45 - 2:35	English (fitness once/week)
2:35 - 2:50	Afternoon homeroom
2:50 - 3:50	Focus/Tutoring
3:50-4:00	Closing

On Fridays, we will operate an abbreviated version of the above schedule with 4 core academic blocks before lunch and Enrichment running from 12:30 - 1:30, after which students will be dismissed.

School Calendar

Attached as *Attachment 12* is an example of our proposed school calendar. This sample calendar, which will be updated to reflect the actual first year of operation, is reflective of and aligned with our mission and approach:

- We will be in a session for 185 calendar days which is 5 more than is required by statute.
- We have organized the school year into four quarters, each with a defined mid-point and end point in which formal written reports of progress and performance will be distributed to families. We will set parent teacher conferences at the beginning of the year so families can plan accordingly for these important meetings which follow shortly after the release of report cards.
- We will have early release every Friday which will allow for critical professional development time for staff. Each Friday afternoon will be dedicated to either content department meetings or school-based planning and professional development.
- An additional four full-day professional development days will be scheduled for school-wide professional development.
- Our start date for staff commences three weeks before the start of school for new students. During that first week, all new staff participate in New Staff Orientation which provides a comprehensive overview of our program including curriculum and instruction, culture, school operations, and human resources. Two weeks before the start of the school year for students, all staff report for Staff Summit – an intensive 10 days of preparation for the new school year. Professional development and meetings are organized to ensure a smooth transition to the start of the school year. During this time, curriculum is reviewed and refined, instructional priorities are launched through comprehensive professional development, operational protocols are reviewed and tested, and staff culture is rooted and fostered.
- During the summer, two weeks are set for summer school for students requiring an extended school year and/or students who are remediating skills and content in order to be promoted.

Teacher Schedule

The daily and weekly schedule for teachers will be strategically and carefully developed to:

- Maximize our human resources to best achieve the school's mission;

- Ensure teachers have a manageable number of weekly lessons to plan, prepare and deliver;
- Allow teachers to become experts in the standards in particular grade and/or content area, and
- Provide teachers a manageable student caseload so they can build purposeful and deep relationships with their students.

With these goals at the forefront, a teacher at Excel Academy Rhode Island will have a daily teaching to planning ratio of 2:1 – meaning for every two periods a teacher is responsible for delivering content, s/he will have 1 period for planning and preparation. Furthermore, teachers will be provided a planning morning or afternoon every week in which s/he will not have any classroom duties for 4 consecutive periods. This planning period is intended to provide teachers the time and space needed to develop thorough plans for the following week, correct assessments or extensive assignments, and/or make calls to families to communicate performance updates. Teachers with the same content area will have the same planning morning/afternoon to encourage collaboration and support among teachers planning and preparing similar content.

The following is a sample weekly schedule of a 7th grade English teacher that identifies teaching responsibilities, preparation periods and non-instructional coverage (e.g. break, lunch) responsibilities .

Sample 7th Grade English Teacher Schedule					
	MONDAY	**TUESDAY**	**WEDNESDAY**	**THURSDAY**	**FRIDAY**
8:00 - 8:20	Morning HR	Morning HR	Morning HR	PREP	Morning HR
8:20 - 9:10	ELA 1	PREP	ELA 1	PREP	ELA 1
9:10 - 10:00	ELA 2	ELA 1	PREP	PREP	PREP
10:00 - 10:15	Coverage	PREP	Coverage	PREP	PREP
10:15- 11:05	PREP	ELA 2	ELA 2	PREP	ELA 2
11:05 - 11:55	ELA 1	ELA 1	PREP	PREP	PREP
11:55 - 12:25	PREP	Coverage	PREP	PREP	Coverage

12:25 - 12:55	PREP	DEAR	PREP	DEAR	Enrichment (one quarter)/ PREP
12:55 - 1:45	ELA 2	ELA 2	ELA 1	ELA 1	Enrichment (one quarter) 1/PREP
1:45 - 2:35	PREP	PREP	ELA 2	ELA 2	PD
2:35 - 2:50	PM Homeroom	PREP	PREP	PM Homeroom	PD
2:50 - 3:50	Tutoring	Tutoring	Tutoring	Tutoring	PD
3:50-4:00	PM Homeroom	PREP	PREP	PM Homeroom	PD

13. STARTUP TIMELINE

The below startup timeline, dating from the anticipated point of preliminary approval through the date of school opening, provides an overview of the key opening tasks to be undertaken for the opening of the first campus and, as applicable, any successive campus. Excel Academy will consult with RIDE's "Pre-Opening Checklist" and Excel's own internal resources that guided the development and opening of our Massachusetts-based campuses to develop a robust, thorough, and comprehensive action to ensure a smooth and orderly opening.

Action Items	**Start Date**	**Completion Date**	**Point Person**
Governance			
Recruit and formulate founding board	Jan 1	March 15	CEO
Formalize and submit governing documents (by-laws, meeting calendar)		April 15	CEO
Secure legal counsel and insurance		April 15	SST
Enrollment and Admission			
Approve Enrollment Policy and submit to RIDE		March 1	SST
Create recruitment materials and conduct outreach	January 1	March 15	SST

Hold lottery and notify families of results		March 15	SST
Submit enrollment data as required to RIDE		April 1	SST
Request student records		April 1	SST
Conduct diagnostic testing		May 15	EP
Host parent and student orientation		June 1	EP
School Policies and Practices			
Set up student information database	June 1	Aug 15	Ops
Order non-instructional supplies, furniture, equipment and materials		July 1	Ops
Finalize school calendar		June 1	SST
Finalize Code of Conduct, Student Handbook		Aug 1	SST
Finalize all health and safety-related requirements		Aug 1	SST
School Facility and Building Safety			
Secure site	Jan 1	May 1	SST
Oversee renovations/upgrades/improvements		Aug 1	SST
Submit required documentation to RIDE		Aug 1	SST
Conduct safety inspections		Aug 1	SST
Secure janitorial services		Aug 1	SST
Staff Recruitment, Evaluation, and Professional Development			
Develop and post job descriptions	Jan 1	Feb 15	SST
Recruit and hire staff		Aug 1	EP
Develop staff policies and handbook		Aug 1	SST
Plan and hold staff orientation		Aug 1	EP
Obtain all requirement employment documentation		Aug 15	SST
Educational Program and Curriculum			
Finalize curriculum	March 1	Aug 1	EP

Order materials, supplies and equipment		July 1	Ops
Contract with special population specialists		July 1	Ops
Financial Systems			
Apply for tax exempt status	Jan 1	March 1	SST
Secure independent auditor		March 1	SST
Establish financial accounting systems and policies		March 1	SST
Set up bank accounts		March 1	SST
Finalize annual budget		April 1	SST
Obtain insurance		April 1	SST
Transportation and Food Services			
Develop transportation plan		July 15	SST
Contract with a food service vendor		July 15	SST

Key: CEO= Chief Executive Officer, EP= Executive Principal, SST= School Support Team, Ops = Dean of Operations

14. VARIANCES

Excel requests a variance from RIGL 16-77 (13 i-ii):

(i) Teachers and administrators in a mayoral academy shall be entitled to prevailing wages and benefits as enjoyed by other public school teachers and administrators;
(ii) Teachers and administrators in a mayoral academy shall be entitled to participate in the state teachers' retirement system under chapter 8 of title 36;
(iii) Employment in a mayoral academy shall be considered "service" as that term is defined in chapter 16 of this title.

We request this variance to maximize our autonomy in developing and executing a staff recruitment and retention plan that best aligns with the goals and needs of our program while allowing maximum flexibility over the allocation of resources to best achieve our mission. As detailed in Section 8 (Organizational Capacity) of this application, Excel Academy Rhode Island is committed to fair recruitment, compensation and retention policies.

15. CHARTER SCHOOL PROGRAM GRANT INTENT TO APPLY

Mission and Targeted Population

The mission of Excel Academy Rhode Island is to prepare students to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities. Through a partnership with Excel Academy Charter Schools, a charter school operator based in Massachusetts, Excel Academy Rhode Island will provide an integrated Kindergarten-12th grade education to 2,186 students in Providence, Central Falls and North Providence.

Start Up Needs and Priorities

While Excel Academy Rhode Island will benefit greatly from the existing infrastructure, systems and support from our Massachusetts-based school and School Support Team, Excel will seek CSP funds to support start-up needs and priorities that are specific to the establishment of this new school . Such expenses may include:

- ***Student recruitment:*** costs associated with advertising and marketing to a broad and diverse audience;
- ***Staff recruitment:*** costs associated with advertising and marketing employment opportunities to a broad and diverse candidate pool;
- ***Professional development:*** professional development on instructional practices and special education and MLL supports;
- ***Salaries and benefits:*** salaries and benefits for the Executive Principal and other administrative staff in the planning year; and
- ***Supplies and materials:*** outfitting of all classroom with libraries, signage, and student materials.

16. APPENDIX OF ATTACHMENTS

Attachment 1: Enrollment Table

Enrollment Projections		Pre-Open	Launch Years								Full Scale
	Grade	SY21-22	SY22-23	SY23-24	SY24-25	SY25-26	SY26-27	SY27-28	SY28-29	SY29-30	SY30-31
	K	0	54	108	162	162	162	162	162	162	162
	1	0	54	108	162	162	162	162	162	162	162
	2	0	0	54	108	162	162	162	162	162	162
	3	0	0	0	54	108	162	162	162	162	162
	4	0	0	0	0	54	108	162	162	162	162
	5	0	58	116	174	174	174	174	174	174	174
	6	0	0	58	174	174	174	174	174	174	174
	7	0	0	0	58	174	174	174	174	174	174
	8	0	0	0	0	58	174	174	174	174	174
	9	0	0	0	0	0	58	174	174	174	174
	10	0	0	0	0	0	0	58	174	174	174
	11	0	0	0	0	0	0	0	56	169	169
	12	0	0	0	0	0	0	0	0	56	164
	Total	**0**	**166**	**444**	**892**	**1228**	**1510**	**1738**	**1910**	**2079**	**2186**

Breakdown by District

Providence	80.0%	0	133	355	714	982	1208	1390	1528	1663	1749
Central Falls	10.0%	0	17	44	89	123	151	174	191	208	219
North Providence	10.0%	0	17	44	89	123	151	174	191	208	219

F/R Lunch Eligibility Projection

Providence	90.8%	0	121	323	648	892	1097	1262	1388	1510	1588
Central Falls	94.4%	0	16	42	84	116	143	164	180	196	206
North Providence	46.5%	0	8	21	41	57	70	81	89	97	102

Attachment 2: Mayor Letters of Support

JAMES A. DIOSSA
MAYOR

TRACEY M. GIRON
CHIEF OF STAFF

CITY OF CENTRAL FALLS
MAYOR'S OFFICE

580 BROAD STREET
CENTRAL FALLS, RI 02863

OFFICE: (401) 727-7455
FAX: (401) 727-7422

September 24, 2020

Dear Barbara Cottam and Commissioner, Infante-Green,

I am writing in support of the charter application for Excel Academy Charter Schools (Excel). Excel is led by Owen Stearns, an experienced educator with a track record of success in neighboring Massachusetts. The Excel Academy consists of four high achieving Boston area schools that are focused on serving traditionally underserved populations. Excel Academy serves a similar population of students to Central Falls and had proficiency rates 30% higher on the most recent state test (the same state tests are administered in Massachusetts and Rhode Island).

I also expect Excel to build a strong, collaborative relationship with the school District that keeps students at the center of all decisions and ensures the sharing of effective practices.

I am convinced that increased options through the approval of Excel will help not only the students in that school but also the wider Central Falls community. Additional high-quality options create a climate that facilitates the ongoing collaborative effort to redesign our district schools focusing on equity, empowerment, and excellence and better serve all students.

Central Falls is a community of engaged citizens with a strong desire to create a city that best serves each individual. As both a citizen born and raised in Central Falls and Mayor, I have continuously worked to ensure Central Falls' success today and in years to come. In particular I see Excel as part of a strategy to improve opportunities for some of the youngest citizens in our community through access to high quality education.

As a nation, we are facing extraordinarily challenging times and I am proud of the work of the citizens of Central Falls. In particular, our educators and district leaders who have worked tirelessly to serve students safely and equitably in the face of the COVID-19 pandemic. Today it is more important than ever to work together and leverage all of our resources to best serve families. Excel is a key part of this, and its approval will provide high quality educational opportunities for thousands of Rhode Islanders for years to come. It is for all of the reasons above that Excel has the long-term support of myself and my office. I am authorized and willing to serve on the Board of the Excel Academy Rhode Island Mayoral Academy.

Sincerely,

James A. Diossa, Mayor

TOWN OF
NORTH PROVIDENCE

STATE OF
RHODE ISLAND

CHARLES LOMBARDI
Mayor

OFFICE OF THE MAYOR
2000 Smith Street
North Providence, RI 02911
Phone 232-0900
Fax 232-3434

September 23, 2020

Angélica Infante-Green
Commissioner
Rhode Island Department of Education
255 Westminster Street
Providence, RI 02903

Barbara Cottam
Chair
RI Board of Education
Council on Elementary and Secondary Education
255 Westminster Street
Providence, RI 02903

Dear Commissioner Infante-Green and Chair Cottam:

I write in support of the application of Excel Academy Charter Schools to establish a mayoral academy in Rhode Island, and in support of the town's participation in the school's catchment area. I am pleased that students in the Town of North Providence would be eligible to attend this new school, if approved. My experience working with other mayoral academies, specifically Achievement First has shown me the dedication of these schools to work with their partner communities to provide high quality education to all of their students.

I understand Excel Academy has achieved consistent success in their schools in Massachusetts and look forward to the opportunity to work with them to provide an additional high quality option for the residents of North Providence. The school's focus and success in working with multilingual learners and differently-abled students will be an asset to the town.

As mayor, I am constantly working to create new opportunities for North Providence residents and to find partners that will enhance our community. I see the establishment of the Excel Academy as a significant opportunity to access a high-quality education for students and families in North Providence. I fully support the approval of the Excel Academy application and the town's participation in the school's catchment area. If Excel Academy's application is approved, I am authorized and willing to serve on the Board of the Excel Academy Rhode Island Mayoral Academy.

Sincerely,

Charles A. Lombardi
Mayor

Mayor of Providence

Jorge O. Elorza

Dear Barbara Cottam and Commissioner Infante-Green,

I am writing this letter in support of Excel Academy's application. There is a clear need for more high-quality schools in Providence, and I believe Excel will help fill this necessity for the residents of the city. Over the past year, the City of Providence has worked with the state and district to welcome new opportunities that best serve students. If approved, Excel Academy will serve as an additional transformational opportunity bringing improved educational outcomes impacting thousands of students in Providence for years to come.

Excel Academy has demonstrated success across their four schools in Massachusetts, where they serve a similar student population to Providence. In last year's state tests, Excel Academy students outperformed their peers in PPSD schools with proficiency rates over 30% higher in both ELA and Math. In addition, Excel's graduates have far exceeded state and national averages in terms of post-secondary success, particularly college completion. I believe that Excel can bring these strong outcomes to our students and increase the number of highly rated schools in Providence. I look forward to Excel bringing their success's particularly with differently abled and multilingual learners to Providence and meeting the unique needs of our students.

As we navigate this particularly difficult time in the world, Providence continues to seek new opportunities for collaboration and partnership to help our community through the new challenges we face. In Excel, I see a strong partner who is committed to working with the Providence community and the Providence Public School district to dramatically improve outcomes for the children in our city.

I am proud to have served as Mayor of Providence for the past five years, working with the community to create a New Providence - a forward-looking city of engaged citizens and shared values. In the coming years, I am hopeful that we will work together as a city to improve the quality of education so that *all* Providence students have access to quality education. I fully support Excel Academy to help us achieve this important mission. If Excel Academy's application is approved, I am authorized and willing to serve on the Board of the Excel Academy - Rhode Island Mayoral Academy.

Sincerely,

Jorge Elorza, Mayor
City of Providence

City Hall, 25 Dorrance Street, Providence, RI 02903
Phone (401) 421-7740 Fax (401) 274-8240

Attachment 3: Outline of Course of Study

Outline of Curriculum – ELEMENTARY

ENGLISH LANGUAGE ARTS

Kindergarten

Subject	Common Core Standards	Curriculum Description, Research & Best Practices
Speaking and Listening	CCSS.ELA-LITERACY.SL.K.1 CCSS.ELA-LITERACY.SL.K.2 CCSS.ELA-LITERACY.SL.K.3 CCSS.ELA-LITERACY.SL.K.4 CCSS.ELA-LITERACY.SL.K.5 CCSS.ELA-LITERACY.SL.K.6 CCSS.ELA-LITERACY.W.K.1 CCSS.ELA-LITERACY.W.K.2 CCSS.ELA-LITERACY.W.K.3	**Storytelling and Dramatization** (Paley, 1997, 1991) Vivian Paley is a well-respected early educator and author who has written several books on the benefits of storytelling and play in early elementary classrooms. Our kindergartners will engage in 30 minutes of play and dramatization per day. Their play-based stories will directly support the CCSS Listening and Speaking standards as well as several writing standards related to text types and purposes. **Read Aloud** A landmark study by Hart and Risley (1995) showed that children with low-income families were exposed to 30 million fewer words before entering school than children with high come families. Exposure to words matters. As such, teachers will read aloud at least one story each day, with a non-fiction to fiction ration of 60% to 40%, respectively. During and after Read Aloud, students will engage in text-based discussions during which they will apply all Speaking and Listening Common Core standards.
Reading, Writing and Language	Reading CCSS.ELA-LITERACY.RL.K.1 CCSS.ELA-LITERACY.RL.K.2 CCSS.ELA-LITERACY.RL.K.3 CCSS.ELA-LITERACY.RL.K.4 CCSS.ELA-LITERACY.RL.K.5 CCSS.ELA-LITERACY.RL.K.6 CCSS.ELA-LITERACY.RL.K.7 CCSS.ELA-LITERACY.RL.K.8 CCSS.ELA-LITERACY.RL.K.9 CCSS.ELA-LITERACY.RL.K.10 CCSS.ELA-LITERACY.RI.K.1 CCSS.ELA-LITERACY.RI.K.2 CCSS.ELA-LITERACY.RI.K.3 CCSS.ELA-LITERACY.RI.K.4 CCSS.ELA-LITERACY.RI.K.5 CCSS.ELA-LITERACY.RI.K.6 CCSS.ELA-LITERACY.RI.K.7 CCSS.ELA-LITERACY.RI.K.8 CCSS.ELA-LITERACY.RI.K.9 CCSS.ELA-LITERACY.RI.K.10 CCSS.ELA-LITERACY.RF.K.1 CCSS.ELA-LITERACY.RF.K.2 CCSS.ELA-LITERACY.RF.K.3 CCSS.ELA-LITERACY.RF.K.4 Writing CCSS.ELA-LITERACY.W.K.1 CCSS.ELA-LITERACY.W.K.2 CCSS.ELA-LITERACY.W.K.3 CCSS.ELA-LITERACY.W.K.4 CCSS.ELA-LITERACY.W.K.5 CCSS.ELA-LITERACY.W.K.6 CCSS.ELA-LITERACY.W.K.7 CCSS.ELA-LITERACY.W.K.8 CCSS.ELA-LITERACY.W.K.9 CCSS.ELA-LITERACY.W.K.10 Language CCSS.ELA-LITERACY.L.K.1 CCSS.ELA-LITERACY.L.K.2 CCSS.ELA-LITERACY.L.K.3	EL Education Children learn more when content is at the core of the curriculum (Wexler, 2020; Lemov, 2017). A 1997 study by Landers and Dumais revealed that reading or listening to a series of texts on the same topic can yielded as much as four times the vocabulary growth as reading unrelated texts. EL Education is an Ed-Report-Approved curriculum that offers three hours of daily literacy instruction, including 120 minutes of vocabulary-rich, content-based instruction and 60 minutes of explicit phonics instruction for students in grades K-2. Independent reading is also included in the three hour literacy block

	CCSS.ELA-LITERACY.L.K.4 CCSS.ELA-LITERACY.L.K.5 CCSS.ELA-LITERACY.L.K.6	
First Grade		
Speaking and Listening	CCSS.ELA-LITERACY.SL.1.1 CCSS.ELA-LITERACY.SL.1.2 CCSS.ELA-LITERACY.SL.1.3 CCSS.ELA-LITERACY.SL.1.4 CCSS.ELA-LITERACY.SL.1.5 CCSS.ELA-LITERACY.SL.1.6	**Read Aloud** A landmark study by Hart and Risley (1995) showed that children with low-income families were exposed to 30 million fewer words before entering school than children with high come families. Exposure to words matters. As such, teachers will read aloud at least one story each day, with a non-fiction to fiction ratio of 60% to 40%, respectively. During and after Read Aloud, students will engage in text-based discussions during which they will apply all Speaking and Listening Common Core standards.
Reading, Writing and Language	Reading CCSS.ELA-LITERACY.RL.1.1 CCSS.ELA-LITERACY.RL.1.2 CCSS.ELA-LITERACY.RL.1.3 CCSS.ELA-LITERACY.RL.1.4 CCSS.ELA-LITERACY.RL.1.5 CCSS.ELA-LITERACY.RL.1.6 CCSS.ELA-LITERACY.RL.1.7 CCSS.ELA-LITERACY.RL.1.8 CCSS.ELA-LITERACY.RL.1.9 CCSS.ELA-LITERACY.RL.1.10 CCSS.ELA-LITERACY.RF.1.1 CCSS.ELA-LITERACY.RF.1.2 CCSS.ELA-LITERACY.RF.1.3 CCSS.ELA-LITERACY.RF.1.4 Writing CCSS.ELA-LITERACY.RI.1.1 CCSS.ELA-LITERACY.RI.1.2 CCSS.ELA-LITERACY.RI.1.3 CCSS.ELA-LITERACY.RI.1.4 CCSS.ELA-LITERACY.RI.1.5 CCSS.ELA-LITERACY.RI.1.6 CCSS.ELA-LITERACY.RI.1.7 CCSS.ELA-LITERACY.RI.1.8 CCSS.ELA-LITERACY.RI.1.9 CCSS.ELA-LITERACY.RI.1.10 Language CCSS.ELA-LITERACY.L.1.1 CCSS.ELA-LITERACY.L.1.2 CCSS.ELA-LITERACY.L.1.3 CCSS.ELA-LITERACY.L.1.4 CCSS.ELA-LITERACY.L.1.5 CCSS.ELA-LITERACY.L.1.6	EL Education Children learn more when content is at the core of the curriculum (Wexler, 2020; Lemov, 2017). A 1997 study by Landers and Dumais revealed that reading or listening to a series of texts on the same topic can yield as much as four times the vocabulary growth as reading unrelated texts. EL Education is an Ed-Report-Approved curriculum that offers three hours of daily literacy instruction, including 120 minutes of vocabulary-rich, content-based instruction and 60 minutes of explicit phonics instruction for students in grades K-2. Independent reading is also included in the three hour literacy block
Second Grade		
Speaking and Listening	CCSS.ELA-LITERACY.SL.2.1 CCSS.ELA-LITERACY.SL.2.2 CCSS.ELA-LITERACY.SL.2.3 CCSS.ELA-LITERACY.SL.2.4 CCSS.ELA-LITERACY.SL.2.5 CCSS.ELA-LITERACY.SL.2.6	**Read Aloud** A landmark study by Hart and Risley (1995) showed that children with low-income families were exposed to 30 million fewer words before entering school than children with high come families. Exposure to words matters. As such, teachers will read aloud at least one story each day, with a non-fiction to fiction ratio of 60% to 40%, respectively. During and after Read Aloud, students will engage in text-based discussions during which they will apply all Speaking and Listening Common Core standards.
Reading, Writing and Language	Reading CCSS.ELA-LITERACY.RL.2.1 CCSS.ELA-LITERACY.RL.2.2 CCSS.ELA-LITERACY.RL.2.3 CCSS.ELA-LITERACY.RL.2.4 CCSS.ELA-LITERACY.RL.2.5	EL Education Children learn more when content is at the core of the curriculum (Wexler, 2020; Lemov, 2017). A 1997 study by Landers and Dumais revealed that reading or listening to a series of texts on the same topic can yield as much as four times the vocabulary growth as reading unrelated texts. EL Education is an Ed-Report-Approved curriculum that offers three hours of daily literacy instruction, including 120 minutes of

	CCSS.ELA-LITERACY.RL.2.6 CCSS.ELA-LITERACY.RL.2.7 CCSS.ELA-LITERACY.RL.2.8 CCSS.ELA-LITERACY.RL.2.9 CCSS.ELA-LITERACY.RL.2.10 CCSS.ELA-LITERACY.RI.2.1 CCSS.ELA-LITERACY.RI.2.2 CCSS.ELA-LITERACY.RI.2.3 CCSS.ELA-LITERACY.RI.2.4 CCSS.ELA-LITERACY.RI.2.5 CCSS.ELA-LITERACY.RI.2.6 CCSS.ELA-LITERACY.RI.2.7 CCSS.ELA-LITERACY.RI.2.8 CCSS.ELA-LITERACY.RI.2.9 CCSS.ELA-LITERACY.RI.2.10 CCSS.ELA-LITERACY.RF.2.3 CCSS.ELA-LITERACY.RF.2.4 Writing CCSS.ELA-LITERACY.W.2.1 CCSS.ELA-LITERACY.W.2.2 CCSS.ELA-LITERACY.W.2.3 CCSS.ELA-LITERACY.W.2.4 CCSS.ELA-LITERACY.W.2.5 CCSS.ELA-LITERACY.W.2.6 CCSS.ELA-LITERACY.W.2.7 CCSS.ELA-LITERACY.W.2.8 CCSS.ELA-LITERACY.W.2.9 CCSS.ELA-LITERACY.W.2.10 Language CCSS.ELA-LITERACY.L.2.1 CCSS.ELA-LITERACY.L.2.2 CCSS.ELA-LITERACY.L.2.3 CCSS.ELA-LITERACY.L.2.4 CCSS.ELA-LITERACY.L.2.5 CCSS.ELA-LITERACY.L.2.6	vocabulary-rich, content-based instruction and 60 minutes of explicit phonics instruction for students in grades K-2.Independent reading is also included in the three hour literacy block
Third Grade		
Speaking and Listening	CCSS.ELA-LITERACY.SL.3.1 CCSS.ELA-LITERACY.SL.3.2 CCSS.ELA-LITERACY.SL.3.3 CCSS.ELA-LITERACY.SL.3.4 CCSS.ELA-LITERACY.SL.3.5 CCSS.ELA-LITERACY.SL.3.6	**Non-Fiction Read Aloud** A landmark study by Hart and Risley (1995) showed that children with low-income families were exposed to 30 million fewer words before entering school than children with high come families. Exposure to words matters, **Starting in third grade,** teachers will only read non-fiction texts during the Read Aloud block. During and after Read Aloud, students will engage in text-based discussions during which they will apply all Speaking and Listening Common Core standards.
Reading and Writing	Reading CCSS.ELA-LITERACY.RL.3.1 CCSS.ELA-LITERACY.RL.3.2 CCSS.ELA-LITERACY.RL.3.3 CCSS.ELA-LITERACY.RL.3.4 CCSS.ELA-LITERACY.RL.3.5 CCSS.ELA-LITERACY.RL.3.6 CCSS.ELA-LITERACY.RL.3.7 CCSS.ELA-LITERACY.RL.3.8 CCSS.ELA-LITERACY.RL.3.9 CCSS.ELA-LITERACY.RL.3.10 CCSS.ELA-LITERACY.RI.3.1 CCSS.ELA-LITERACY.RI.3.2 CCSS.ELA-LITERACY.RI.3.3 CCSS.ELA-LITERACY.RI.3.4 CCSS.ELA-LITERACY.RI.3.5 CCSS.ELA-LITERACY.RI.3.6 CCSS.ELA-LITERACY.RI.3.7	**Reading Reconsidered** Starting in third grade, teachers will utilize the Reading Reconsidered (RR) curriculum. Created by Doug Lemov in consultation with content-based learning experts, such as Natalie Wexler, RR provides comprehensive coverage of all 3rd-5th grade Reading and Writing standards while prioritizing content-based instruction, vocabulary acquisition, independent reading and sustained opportunities for independent writing. Uncommon Schools, a network of premier charter schools in New York, Massachusetts and Connecticut, utilize this curriculum. Their students regularly outperform their peers at the local, state and national level.

	CCSS.ELA-LITERACY.RI.3.8 CCSS.ELA-LITERACY.RI.3.9 CCSS.ELA-LITERACY.RI.3.10 CCSS.ELA-LITERACY.RF.3.3 CCSS.ELA-LITERACY.RF.3.4 Writing CCSS.ELA-LITERACY.W.3.1 CCSS.ELA-LITERACY.W.3.2 CCSS.ELA-LITERACY.W.3.3 CCSS.ELA-LITERACY.W.3.4 CCSS.ELA-LITERACY.W.3.5 CCSS.ELA-LITERACY.W.3.6 CCSS.ELA-LITERACY.W.3.7 CCSS.ELA-LITERACY.W.3.8 CCSS.ELA-LITERACY.W.3.9 CCSS.ELA-LITERACY.W.3.10	
Language	CCSS.ELA-LITERACY.L.3.1 CCSS.ELA-LITERACY.L.3.2 CCSS.ELA-LITERACY.L.3.3 CCSS.ELA-LITERACY.L.3.4 CCSS.ELA-LITERACY.L.3.5 CCSS.ELA-LITERACY.L.3.6	Beginning in the third grade, teachers will utilize The Writing Revolution (TWR) method for creating clear, grammatically correct sentences and paragraphs. TWR was founded by Judith Hochman, former Head of School at the Winward School in New York, a school for students with learning disabilities. Hochman gained national recognition when The Atlantic published a piece in 2012 featuring her work with New Dorp High School in New York (Tyre, 2012). Hochman's writing strategies led to a turnaround in the school's achievement. Currently, 75% partnering with TWR report that their students are proficient paragraph writers (per the TWR Single Paragraph Rubric). TWR strategies work best when embedded within content-based curricula. Thus, we expected to nicely complete our EL Education Curriculum.
Fourth Grade		
Speaking and Listening	CCSS.ELA-LITERACY.SL.4.1 CCSS.ELA-LITERACY.SL.4.2 CCSS.ELA-LITERACY.SL.4.3 CCSS.ELA-LITERACY.SL.4.4 CCSS.ELA-LITERACY.SL.4.5 CCSS.ELA-LITERACY.SL.4.6	**Non-Fiction Read Aloud** A landmark study by Hart and Risley (1995) showed that children with low-income families were exposed to 30 million fewer words before entering school than children with high come families. Exposure to words matters, **Starting in third grade,** teachers will only read non-fiction texts during the Read Aloud block. During and after Read Aloud, students will engage in text-based discussions during which they will apply all Speaking and Listening Common Core standards.
Reading and Writing	Reading CCSS.ELA-LITERACY.RL.4.1 CCSS.ELA-LITERACY.RL.4.2 CCSS.ELA-LITERACY.RL.4.3 CCSS.ELA-LITERACY.RL.4.4 CCSS.ELA-LITERACY.RL.4.5 CCSS.ELA-LITERACY.RL.4.6 CCSS.ELA-LITERACY.RL.4.7 CCSS.ELA-LITERACY.RL.4.8 CCSS.ELA-LITERACY.RL.4.9 CCSS.ELA-LITERACY.RL.4.10 CCSS.ELA-LITERACY.RI.4.1 CCSS.ELA-LITERACY.RI.4.2 CCSS.ELA-LITERACY.RI.4.3 CCSS.ELA-LITERACY.RI.4.4 CCSS.ELA-LITERACY.RI.4.5 CCSS.ELA-LITERACY.RI.4.6 CCSS.ELA-LITERACY.RI.4.7 CCSS.ELA-LITERACY.RI.4.8 CCSS.ELA-LITERACY.RI.4.9 CCSS.ELA-LITERACY.RI.4.10 CCSS.ELA-LITERACY.RF.4.3 CCSS.ELA-LITERACY.RF.4.4 Writing CCSS.ELA-LITERACY.W.4.1 CCSS.ELA-LITERACY.W.4.2 CCSS.ELA-LITERACY.W.4.3 CCSS.ELA-LITERACY.W.4.4	**Reading Reconsidered** Teachers will utilize the Reading Reconsidered (RR) curriculum. Created by Doug Lemov in consultation with content-based learning experts, such as Natalie Wexler, RR provides comprehensive coverage of all 3rd-5th grade Reading and Writing standards while prioritizing content-based instruction, vocabulary acquisition, independent reading and sustained opportunities for independent writing. Uncommon Schools, a network of premier charter schools in New York, Massachusetts and Connecticut, utilize this curriculum. Their students regularly outperform their peers at the local, state and national level.

	CCSS.ELA-LITERACY.W.4.5 CCSS.ELA-LITERACY.W.4.6 CCSS.ELA-LITERACY.W.4.7 CCSS.ELA-LITERACY.W.4.8 CCSS.ELA-LITERACY.W.4.9 CCSS.ELA-LITERACY.W.4.10	
Language	CCSS.ELA-LITERACY.L.4.1 CCSS.ELA-LITERACY.L.4.2 CCSS.ELA-LITERACY.L.4.3 CCSS.ELA-LITERACY.L.4.4 CCSS.ELA-LITERACY.L.4.5 CCSS.ELA-LITERACY.L.4.6	Beginning in the third grade, teachers will utilize The Writing Revolution (TWR) method for creating clear, grammatically correct sentences and paragraphs. TWR was founded by Judith Hochman, former Head of School at the Winward School in New York, a school for students with learning disabilities. Hochman gained national recognition when The Atlantic published a piece in 2012 featuring her work with New Dorp High School in New York (Tyre, 2012). Hochman's writing strategies led to a turnaround in the school's achievement. Currently, 75% partnering with TWR report that their students are proficient paragraph writers (per the TWR Single Paragraph Rubric). TWR strategies work best when embedded within content-based curricula. Thus, we expected to nicely complete our EL Education Curriculum.

MATHEMATICS

Kindergarten

Common Core Standards	**Curriculum Description, Research & Best Practices**
Counting & Cardinality CCSS.MATH.CONTENT.K.CC.A.1 CCSS.MATH.CONTENT.K.CC.A.2 CCSS.MATH.CONTENT.K.CC.A.3 CCSS.MATH.CONTENT.K.CC.B.4 CCSS.MATH.CONTENT.K.CC.B.5 CCSS.MATH.CONTENT.K.CC.C.6 CCSS.MATH.CONTENT.K.CC.C.7 **Operations & Algebraic Thinking** CCSS.MATH.CONTENT.K.OA.A.1 CCSS.MATH.CONTENT.K.OA.A.2 CCSS.MATH.CONTENT.K.OA.A.3 CCSS.MATH.CONTENT.K.OA.A.4 CCSS.MATH.CONTENT.K.OA.A.5 **Number & Operations in Base Ten** CCSS.MATH.CONTENT.K.NBT.A.1 **Measurement & Data** CCSS.MATH.CONTENT.K.MD.A.1 CCSS.MATH.CONTENT.K.MD.A.2 CCSS.MATH.CONTENT.K.MD.B.3 **Geometry** CCSS.MATH.CONTENT.K.G.A.1 CCSS.MATH.CONTENT.K.G.A.2 CCSS.MATH.CONTENT.K.G.A.3 CCSS.MATH.CONTENT.K.G.B.4 CCSS.MATH.CONTENT.K.G.B.5 CCSS.MATH.CONTENT.K.G.B.6	**Eureka Math** Excel Elementary teachers will use the Ed-Report-approved Eureka Math Curriculum by Engage New York. Engage NY, a long-time leader in the creation of high-quality Common-Core-based curriculum, has served as an excellent open-source resource for schools across the country. Productive struggle is at the core of the curriculum. When challenge is paired with a standards-based curriculum that provides students with the prerequisite skills to tackle challenging math problems, deep, conceptual learning that is both sticky and transferable occurs. District schools across the country have reported strong student growth as a result of implementing Eureka Math **Cognitively Guided Instruction (CGI)** CGI is a constructivist method of teaching math that places problem solving and discussion at the heart of each lesson. Using CGI practices, Excel Elementary teachers will lead a section of the day called, "Number Stories" in which students grapple with a rigorous, standards-based question that will require the application and integration of a variety of interconnected standards. Teachers will then facilitate a discussion highlighting various ways students arrived at a correct answer to the same problem. (Carpenter, Fennema and Franke, 1996)

First Grade

Common Core Standards	**Curriculum Description, Research & Best Practices**
Operations & Algebraic Thinking CCSS.MATH.CONTENT.1.OA.A.1 CCSS.MATH.CONTENT.1.OA.A.2 CCSS.MATH.CONTENT.1.OA.B.3 CCSS.MATH.CONTENT.1.OA.B.4 CCSS.MATH.CONTENT.1.OA.C.5 CCSS.MATH.CONTENT.1.OA.C.6 CCSS.MATH.CONTENT.1.OA.D.7 CCSS.MATH.CONTENT.1.OA.D.8 **Number & Operations in Base Ten**	**Eureka Math** Excel Elementary teachers will use the Ed-Report-approved Eureka Math Curriculum Great Minds. Great Minds is an off-shoot of Engage New York, a long-time leader in the creation of high-quality Common-Core-based curriculum, which has served as an excellent open-source resource for schools across the country. Productive struggle is at the core of the curriculum. When challenge is paired with a standards-based curriculum that provides students with the prerequisite skills to tackle challenging math problems, deep, conceptual learning that is both sticky and transferable occurs. District schools across the country have reported strong student growth as a result of implementing Eureka Math.

CCSS.MATH.CONTENT.1.NBT.A.1 CCSS.MATH.CONTENT.1.NBT.B.2 CCSS.MATH.CONTENT.1.NBT.B.3 CCSS.MATH.CONTENT.1.NBT.C.4 CCSS.MATH.CONTENT.1.NBT.C.5 CCSS.MATH.CONTENT.1.NBT.C.6 **Measurement & Data** CCSS.MATH.CONTENT.1.MD.A.1 CCSS.MATH.CONTENT.1.MD.A.2 CCSS.MATH.CONTENT.1.MD.B.3 CCSS.MATH.CONTENT.1.MD.C.4 **Geometry** CCSS.MATH.CONTENT.1.G.A.1 CCSS.MATH.CONTENT.1.G.A.2 CCSS.MATH.CONTENT.1.G.A.3	**Cognitively Guided Instruction (CGI)** CGI is a constructivist method of teaching math that places problem solving and discussion at the heart of each lesson. Using CGI practices, Excel Elementary teachers will lead a section of the day called, "Number Stories" in which students grapple with a rigorous, standards-based question that will require the application and integration of a variety of interconnected standards. Teachers will then facilitate a discussion highlighting various ways students arrived at a correct answer to the same problem. (Carpenter, Fennema and Franke, 1996)
Second Grade	
Operations & Algebraic Thinking CCSS.MATH.CONTENT.2.OA.A.1 CCSS.MATH.CONTENT.2.OA.B.2 CCSS.MATH.CONTENT.2.OA.C.3 CCSS.MATH.CONTENT.2.OA.C.4 **Number & Operations in Base Ten** CCSS.MATH.CONTENT.2.NBT.A.1 CCSS.MATH.CONTENT.2.NBT.A.2 CCSS.MATH.CONTENT.2.NBT.A.3 CCSS.MATH.CONTENT.2.NBT.A.4 CCSS.MATH.CONTENT.2.NBT.B.5 CCSS.MATH.CONTENT.2.NBT.B.6 CCSS.MATH.CONTENT.2.NBT.B.7 CCSS.MATH.CONTENT.2.NBT.B.8 CCSS.MATH.CONTENT.2.NBT.B.9 **Measurement & Data** CCSS.MATH.CONTENT.2.MD.A.1 CCSS.MATH.CONTENT.2.MD.A.2 CCSS.MATH.CONTENT.2.MD.A.3 CCSS.MATH.CONTENT.2.MD.A.4 CCSS.MATH.CONTENT.2.MD.B.5 CCSS.MATH.CONTENT.2.MD.B.6 CCSS.MATH.CONTENT.2.MD.C.7 CCSS.MATH.CONTENT.2.MD.C.8 CCSS.MATH.CONTENT.2.MD.D.9 CCSS.MATH.CONTENT.2.MD.D.10 **Geometry** CCSS.MATH.CONTENT.2.G.A.1 CCSS.MATH.CONTENT.2.G.A.2 CCSS.MATH.CONTENT.2.G.A.3	**Eureka Math** Excel Elementary teachers will use the Ed-Report-approved Eureka Math Curriculum Great Minds. Great Minds is an off-shoot of Engage New York, a long-time leader in the creation of high-quality Common-Core-based curriculum, which has served as an excellent open-source resource for schools across the country. Productive struggle is at the core of the curriculum. When challenge is paired with a standards-based curriculum that provides students with the prerequisite skills to tackle challenging math problems, deep, conceptual learning that is both sticky and transferable occurs. District schools across the country have reported strong student growth as a result of implementing Eureka Math. **Cognitively Guided Instruction (CGI)** CGI is a constructivist method of teaching math that places problem solving and discussion at the heart of each lesson. Using CGI practices, Excel Elementary teachers will lead a section of the day called, "Number Stories" in which students grapple with a rigorous, standards-based question that will require the application and integration of a variety of interconnected standards. Teachers will then facilitate a discussion highlighting various ways students arrived at a correct answer to the same problem. (Carpenter, Fennema and Franke, 1996)
Third Grade	
Operations & Algebraic Thinking CCSS.MATH.CONTENT.3.OA.A.1 CCSS.MATH.CONTENT.3.OA.A.2	**Eureka Math** Excel Elementary teachers will use the Ed-Report-approved Eureka Math Curriculum Great Minds. Great Minds is an off-shoot of Engage New York, a long-time leader in the creation of high-quality Common-Core-based curriculum, which has served as an excellent open-source resource for schools across the country. Productive struggle is at the core of the curriculum. When challenge is paired with a standards-based curriculum that provides students with the prerequisite skills to tackle challenging math problems, deep, conceptual learning that is both sticky and transferable occurs. District schools

CCSS.MATH.CONTENT.3.OA.A.3 CCSS.MATH.CONTENT.3.OA.A.4 CCSS.MATH.CONTENT.3.OA.B.5 CCSS.MATH.CONTENT.3.OA.B.6 CCSS.MATH.CONTENT.3.OA.C.7 CCSS.MATH.CONTENT.3.OA.D.8 CCSS.MATH.CONTENT.3.OA.D.9 **Number & Operations in Base Ten** CCSS.MATH.CONTENT.3.NBT.A.1 CCSS.MATH.CONTENT.3.NBT.A.2 CCSS.MATH.CONTENT.3.NBT.A.3 **Number & Operations – Fractions** CCSS.MATH.CONTENT.3.NF.A.1 CCSS.MATH.CONTENT.3.NF.A.2 CCSS.MATH.CONTENT.3.NF.A.3 **Measurement & Data** CCSS.MATH.CONTENT.3.MD.A.1 CCSS.MATH.CONTENT.3.MD.A.2 CCSS.MATH.CONTENT.3.MD.B.3 CCSS.MATH.CONTENT.3.MD.B.4 CCSS.MATH.CONTENT.3.MD.C.5 CCSS.MATH.CONTENT.3.MD.C.6 CCSS.MATH.CONTENT.3.MD.C.7 CCSS.MATH.CONTENT.3.MD.D.8 **Geometry** CCSS.MATH.CONTENT.3.G.A.1 CCSS.MATH.CONTENT.3.G.A.2	across the country have reported strong student growth as a result of implementing Eureka Math. **Cognitively Guided Instruction (CGI)** CGI is a constructivist method of teaching math that places problem solving and discussion at the heart of each lesson. Using CGI practices, Excel Elementary teachers will lead a section of the day called, "Number Stories" in which students grapple with a rigorous, standards-based question that will require the application and integration of a variety of interconnected standards. Teachers will then facilitate a discussion highlighting various ways students arrived at a correct answer to the same problem. (Carpenter, Fennema and Franke, 1996)
Fourth Grade	
Operations & Algebraic Thinking CCSS.MATH.CONTENT.4.OA.A.1 CCSS.MATH.CONTENT.4.OA.A.2 CCSS.MATH.CONTENT.4.OA.A.3 CCSS.MATH.CONTENT.4.OA.B.4 CCSS.MATH.CONTENT.4.OA.C.5 **Number & Operations in Base Ten** CCSS.MATH.CONTENT.4.NBT.A.1 CCSS.MATH.CONTENT.4.NBT.A.2 CCSS.MATH.CONTENT.4.NBT.A.3 CCSS.MATH.CONTENT.4.NBT.B.4 CCSS.MATH.CONTENT.4.NBT.B.5 CCSS.MATH.CONTENT.4.NBT.B.6 **Number & Operations – Fractions** CCSS.MATH.CONTENT.4.NF.A.1 CCSS.MATH.CONTENT.4.NF.A.2 CCSS.MATH.CONTENT.4.NF.B.3 CCSS.MATH.CONTENT.4.NF.B.4 CCSS.MATH.CONTENT.4.NF.C.5 CCSS.MATH.CONTENT.4.NF.C.6 CCSS.MATH.CONTENT.4.NF.C.7 **Measurement & Data** CCSS.MATH.CONTENT.4.MD.A.1 CCSS.MATH.CONTENT.4.MD.A.2 CCSS.MATH.CONTENT.4.MD.A.3 CCSS.MATH.CONTENT.4.MD.B.4 CCSS.MATH.CONTENT.4.MD.C.5 CCSS.MATH.CONTENT.4.MD.C.6	**Eureka Math** Excel Elementary teachers will use the Ed-Report-approved Eureka Math Curriculum Great Minds. Great Minds is an off-shoot of Engage New York, a long-time leader in the creation of high-quality Common-Core-based curriculum, which has served as an excellent open-source resource for schools across the country. Productive struggle is at the core of the curriculum. When challenge is paired with a standards-based curriculum that provides students with the prerequisite skills to tackle challenging math problems, deep, conceptual learning that is both sticky and transferable occurs. District schools across the country have reported strong student growth as a result of implementing Eureka Math **Cognitively Guided Instruction (CGI)** CGI is a constructivist method of teaching math that places problem solving and discussion at the heart of each lesson. Using CGI practices, Excel Elementary teachers will lead a section of the day called, "Number Stories" in which students grapple with a rigorous, standards-based question that will require the application and integration of a variety of interconnected standards. Teachers will then facilitate a discussion highlighting various ways students arrived at a correct answer to the same problem. (Carpenter, Fennema and Franke, 1996)

CCSS.MATH.CONTENT.4.MD.C.7 **Geometry** CCSS.MATH.CONTENT.4.G.A.1 CCSS.MATH.CONTENT.4.G.A.2 CCSS.MATH.CONTENT.4.G.A.3	

SCIENCE

Kindergarten

Next Generation Science Standards	Curriculum Description, Research & Best Practices
K.Forces and Interactions: Pushes and Pulls *K.Interdependent Relationships in Ecosystems: Animals, Plants, and Their Environment* *K.Weather and Climate* *K-2.Engineering Design*	**Great Minds PhD Science** Excel Elementary teachers will use the Great Minds PhD Science curriculum. Great Minds provides teachers with a comprehensive, inquiry-based, vertically aligned curriculum that prioritizes student discovery and provides teachers with the content support necessary to facilitate strong connections between and amongst science topics covered within and across each grade level.
First Grade	
1.Waves: Light and Sound 1.Structure, Function, and Information Processing 1.Space Systems: Patterns and Cycles K-2.Engineering Design	**Great Minds PhD Science** Excel Elementary teachers will use the Great Minds PhD Science curriculum. Great Minds provides teachers with a comprehensive, inquiry-based, vertically aligned curriculum that prioritizes student discovery and provides teachers with the content support necessary to facilitate strong connections between and amongst science topics covered within and across each grade level.
Second Grade	
2.Structure and Properties of Matter 2.Interdependent Relationships in Ecosystems 2.Earth's Systems: Processes that Shape the Earth K-2.Engineering Design	**Great Minds PhD Science** Excel Elementary teachers will use the Great Minds PhD Science curriculum. Great Minds provides teachers with a comprehensive, inquiry-based, vertically aligned curriculum that prioritizes student discovery and provides teachers with the content support necessary to facilitate strong connections between and amongst science topics covered within and across each grade level.
Third Grade	
3.Forces and Interactions 3.Interdependent Relationships in Ecosystems: Environmental Impacts on Organisms 3.Inheritance and Variation of Traits: Life Cycles and Traits 3.Weather and Climate 3-5.Engineering Design	**Great Minds PhD Science** Excel Elementary teachers will use the Great Minds PhD Science curriculum. Great Minds provides teachers with a comprehensive, inquiry-based, vertically aligned curriculum that prioritizes student discovery and provides teachers with the content support necessary to facilitate strong connections between and amongst science topics covered within and across each grade level.
Fourth Grade	
4.Energy 4.Waves 4.Structure, Function, and Information Processing 4.Earth's Systems: Processes that Shape the Earth 3-5.Engineering Design	**Great Minds PhD Science** Excel Elementary teachers will use the Great Minds PhD Science curriculum. Great Minds provides teachers with a comprehensive, inquiry-based, vertically aligned curriculum that prioritizes student discovery and provides teachers with the content support necessary to facilitate strong connections between and amongst science topics covered within and across each grade level.

SOCIAL STUDIES

Kindergarten-Fourth Grade

Rhode Island Grade Span Expectations for Social Studies ("Social Studies GSEs")	**Examples of Skills/Units** Our social studies standards reflect several goals: Stickiness: We want our social studies teaching to be powerful enough to stick. We think that connecting social studies to a large concept will help it stick with students because it will fit into a large conceptual framework. Transfer: We want our social studies teaching to develop analytic skills that students can transfer to new contexts. Competence with primary sources: We want our social studies teaching to build our students' proficiency in analyzing and learning from primary sources. In elementary grades, this will involve mostly examining primary sources that are unwritten, but as they move through the grades,

	students will increasingly have to analyze and consider primary texts, thereby developing the close reading skills that advanced nonfiction texts require.
C&G 1: People create and change structures of power, authority, and governance in order to accomplish common goals. C&G 2: The Constitution of the United States establishes a government of limited powers that are shared among different levels and branches. C&G 3: In a democratic society all people have certain rights and responsibilities. C&G 4: People engage in political processes in a variety of ways. C&G 5: As members of an interconnected world community, the choices we make impact others locally, nationally, and globally. HP 1: History is an account of human activities that is interpretive in nature. HP 2: History is a chronicle of human activities, diverse people, and the societies they form. HP 3: The study of history helps us understand the present and shape the future. HP 4: Historical events and human/natural phenomena impact and are influenced by ideas and beliefs. HP 5: Human societies and cultures develop and change in response to human needs and wants. G 1: The World in Spatial Terms: Understanding and interpreting the organization of people, places, and environments on Earth's surface provides an understanding of the world in spatial terms. GSEs for Grades K-2 GSEs for Grades 3-4 GSEs for Grades 5-6 GSEs for Grad G 2: Places and Regions: Physical and human characteristics (e.g., culture, experiences, etc.) influence places and regions. G 3: Human Systems: (Movement) Human systems and human movement affect and are affected by distribution of populations and resources, relationships (cooperation and conflict), and culture. G 4: Environment and Society: Patterns emerge as humans settle, modify, and interact on Earth's surface to limit or promote human activities.	**Kindergarten: Where We Live** ● Compare basic geographical features (ex: city v. country). ● Name the city that you live in. **First Grade: Rhode Island and Our Country** ● Identify neighborhood on a city map. ● List and explain the community resources available in neighborhood. ● Locate Providence on a state map. ● Locate Rhode Island on a state map. ● Explain how the regions of Rhode Island are the same and different. ● Locate the United States on a map. ● Explain how regions of the United States are similar and different. ● Locate North America on a map. ● Identify the other countries that make up our continent and label them on a map. **Second Grade: Our Place in the World** ● Use a key/legend and be able to locate places on a map. ● Define major land forms. ● Explain the difference between continents, countries, states and cities. ● Locate and identify the seven continents. ● Explain how location affects climate and lifestyle in three distinct biomes. ● Describe the climate and special traditions of three countries. Understand that Native Americans were the first people to inhabit the current continent of North America. **Third Grade: How Humans Respond to Geography to Meet their Needs** ● Name at least four different biomes (desert, grasslands, deciduous forest, and tropical rain forest) and explain how the natural resources in that biome help animals survive there. ● Use climate maps to identify biomes. Read a key on a map. ● Explain how early humans met their needs through hunting and gathering food. Explain the advantages and disadvantages of hunting-and-gathering. ● Explain why humans domesticated animals and give an example and use of a domesticated animal for each studied region. ● Define agriculture and describe how its invention changed daily life for prehistoric peoples. ● Explain why people sometimes cannot rely on agriculture to meet their need for food. ● Locate the Tigris and Euphrates Rivers. Identify it as the ancient area of Mesopotamia. Locate Iraq, Iran, and Turkey on a modern map. ● Define irrigation and explain the role of water storage and irrigation in helping humans meet their needs. ● Explain how agriculture in Mesopotamia and Ancient Egypt resulted from the development of water storage and irrigation systems. ● Define specialization and explain how people living in communities can meet their needs through specialization. ● Explain how agriculture led to urbanization and specialization. ● Identify types of houses used in Mesopotamia and Ancient Egypt and explain how these houses helped people meet their needs. ● Identify at least four types of houses used by Andean tribes and other Native Americans and explain how those houses helped those tribes meet their needs. ● Identify the foods that Vikings ate, their access to water, and how they protected themselves from the elements. ● Identify the foods that Wampanoag ate, their access to water, and how they protected themselves from the elements. Identify the foods the Japanese eat, their access to water, and how they protected themselves from the elements.

	Fourth Grade: What People Believe ● Unit 1: Polytheism in Ancient Greece ● Unit 2: Hinduism ● Unit 3: Monotheism in Judaism ● Unit 4: Monotheism in Christianity ● Unit 5: Monotheism in Islam

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ENGLISH LANGUAGE ARTS STANDARDS - 5-8TH GRADE ALIGNMENT					
Topic	Anchor Standard	5th Grade	6th Grade	7th Grade	8th Grade
Literature		Literature Reading Standards			
Key Ideas and Details	Read closely to determine what a text states explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from a text.	5.RL.1 Quote or paraphrase a text accurately when explaining what the text states explicitly and when drawing inferences from the text.	Cite textual evidence to support analysis of what a text states explicitly as well as inferences drawn from the text, quoting or paraphrasing as appropriate. See grade 6 Writing Standard 8 for more on quoting and paraphrasing.	Cite several pieces of textual evidence to support analysis of what a text states explicitly as well as inferences drawn from the text, quoting or paraphrasing as appropriate.	Cite the textual evidence that most strongly supports analysis of what a text states explicitly as well as inferences drawn from the text, quoting or paraphrasing as appropriate.
	Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.	5.RL.2 Determine a theme of a story, drama, or poem from details in the text, including how characters in a story or drama respond to challenges or how the speaker in a poem reflects upon a topic; summarize a text.	Determine a theme or central idea of a text and how it is conveyed through particular details; provide a summary of a text distinct from personal opinions or judgments.	Determine a theme or central idea of a text and analyze its development over the course of the text; provide an objective summary of a text.	Determine a theme or central idea of a text and analyze its development over the course of the text, including its relationship to the characters, setting, and plot; provide an objective summary of a text.
	Analyze how and why individuals, events, and ideas develop and interact over the course of a text.	5.RL.3 Compare and contrast two or more characters, settings, or events in a story or drama, drawing on specific details in the text (e.g., how characters interact).	Describe how the plot of a particular story, poem, or drama unfolds in a series of episodes as well as how the characters respond or change as the plot moves toward a resolution.	Analyze how particular elements of a story, poem, or drama interact (e. g., how setting shapes the characters or plot).	Analyze how particular lines of dialogue or incidents in a story, poem, or drama propel the action, reveal aspects of a character, or provoke a decision.

Craft and Structure	Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.	5.RL.4 Determine the meaning of words and phrases as they are used in a text; identify and explain the effects of figurative language such as metaphors and similes.	Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of specific word choices, including those that create repeated sounds and rhythms in poetry, on meaning, tone (i.e., author's attitude toward subject or audience), or mood (i.e., emotional atmosphere).	: Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of specific word choices on meaning, tone, or mood, including the impact of repeated use of particular images.	Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of specific word choices on meaning, tone, or mood, including the impact of allusion and irony.
	Analyze the structure of texts, including how specific sentences, paragraphs, and larger portions of a text relate to each other and the whole.	5.RL.5 Explain how a series of chapters, scenes, or stanzas fits together to provide the overall structure of a particular story, drama, or poem.	Analyze how a particular sentence, chapter, scene, or stanza fits into the overall structure of a text and contributes to the development of the theme, setting, or plot.	Analyze how aspects of a literary work's structure contribute to its meaning or style (e.g., the effect of repetition in an epic, flashback in a novel, soliloquy in a drama).	Compare and contrast the structures of two or more texts, analyzing how structure contributes to meaning and style in each text.
	Assess how point of view or purpose shapes the content and style of a text.	5.RL.6 Describe how a narrator's or speaker's point of view or an author's purpose influences how events are described in a story, myth, poem, or drama.	Explain how an author develops the point of view of the narrator or speaker in a text.	Analyze how an author develops and contrasts the points of view of different characters or narrators in a text.	Analyze how differences in point of view between characters and audience (e.g., created through the use of dramatic irony) create such effects as suspense or humor.
Integration of Knowledge and Ideas	Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.	5. RL.7 Analyze how visual and multimedia elements contribute to the meaning, tone, or beauty of a text (e.g., graphic novel; multimedia presentation of fiction, folktale, myth, poem).	Compare and contrast the experience of reading a story, drama, or poem to that of listening to or viewing the same text	: Compare and contrast a written story, drama, or poem to its audio, filmed, staged, or multimedia version	Analyze the extent to which an audio, filmed, or staged production of a story, drama, or poem stays faithful to or departs from the original text or script, evaluating the choices made by the director or performer(s).
	Delineate and evaluate the argument and specific claims in a text, including the validity of the reasoning as well as the relevance and sufficiency of the evidence.				

	Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.	5.RL.9 Compare and contrast stories in the same genre (e.g., mysteries or adventure stories) on their approaches to similar themes and topics.	Compare and contrast texts in different forms or genres (e.g., stories and poems, historical novels and fantasy stories) in terms of their approaches to similar themes and topics.	Compare and contrast a fictional portrayal of a time, place, or character and a historical account of the same period as a means of understanding how authors of fiction use or alter history.	Analyze how a modern work of fiction draws on themes, patterns of events, or character types from myths, traditional stories, or religious works such as the Bible, including describing how the material is rendered new.
Range of Reading and Level of Text Complexity	Independently and proficiently read and comprehend complex literary and informational texts	5.RL.10 Independently and proficiently read and comprehend literary texts representing a variety of genres, cultures, and perspectives and exhibiting complexity appropriate for at least grade 5.	Independently and proficiently read and comprehend literary texts representing a variety of genres, cultures, and perspectives and exhibiting complexity appropriate for at least grade 6.	Independently and proficiently read and comprehend literary texts representing a variety of genres, cultures, and perspectives and exhibiting complexity appropriate for at least grade 7.	Independently and proficiently read and comprehend literary texts representing a variety of genres, cultures, and perspectives and exhibiting complexity appropriate for at least grade 8

ENGLISH LANGUAGE ARTS STANDARDS - 5-8TH GRADE ALIGNMENT					
Topic	Anchor Standard	5th Grade	6th Grade	7th Grade	8th Grade
Informational		Informational Reading Standards			
Key Ideas and Details	Read closely to determine what a text states explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from a text.	5.RI.1 Quote or paraphrase a text accurately when explaining what the text states explicitly and when drawing inferences from the text.	Cite textual evidence to support analysis of what a text states explicitly as well as inferences drawn from the text, quoting or paraphrasing as appropriate.	Cite several pieces of textual evidence to support analysis of what a text states explicitly as well as inferences drawn from the text, quoting or paraphrasing as appropriate.	Cite the textual evidence that most strongly supports an analysis of what a text states explicitly as well as inferences drawn from the text, quoting or paraphrasing as appropriate.
	Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.	5.RI.2 Determine one or more main ideas of a text paragraph in a text, or section of a text and explain how they are supported by key details; summarize a text.	Determine a text's central idea(s) and how particular details help convey the idea(s); provide a summary of a text distinct from personal opinions or judgments.	Determine a text's central idea(s) and analyze its/their development over the course of the text; provide an objective summary of a text.	Determine a text's central idea(s) and analyze its/their development over the course of the text, including relationships to supporting ideas; provide an objective summary of a text.
	Analyze how and why individuals, events, and ideas develop and interact over the course of a text.	5.RI.3 Explain the relationships or interactions between two or more individuals, events, ideas, or concepts in a historical, scientific, or technical text based on specific information in the text.	Analyze in detail how a key individual, event, or idea is introduced, illustrated, and elaborated in a text (e.g., through examples or anecdotes).	Analyze the interactions between individuals, events, and ideas in a text (e.g., how ideas influence individuals or events, or how individuals influence ideas or events).	Analyze how a text makes connections among and distinctions between individuals, ideas, or events (e.g., through comparisons, analogies, or categories).

Craft and Structure	Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.	5.RI.4 Determine the meaning of general academic and domain-specific words and phrases in a grade-level text.	Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; explain how word choice affects meaning and tone.	Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of a specific word choice on meaning and tone.	Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of specific word choices on meaning and tone, including analogies or allusions to other texts.
	Analyze the structure of texts, including how specific sentences, paragraphs, and larger portions of a text relate to each other and the whole.	5.RI.5 Describe how an author uses one or more structures (e.g., chronology, comparison, cause/effect, problem/solution) of events, to present information in a text.	Analyze how a particular sentence, paragraph, chapter, section, or text feature (e.g., heading) fits into the overall structure of a text and contributes to the development of the ideas.	Analyze the structure an author uses to organize a text, including how the major sections and text features (e.g., headings) contribute to the whole and to the development of the ideas.	Analyze in detail the structural elements of a text, including the role of specific sentences, paragraphs, and text features in developing and refining a key concept.
	Assess how point of view or purpose shapes the content and style of a text.	5.RI.6 Analyze multiple accounts of the same event or topic (including both primary and secondary texts), noting important similarities and differences among the points of view they represent.	Determine an author's point of view or purpose in a text and explain how it is conveyed in the text.	Determine an author's point of view or purpose in a text and analyze how the author distinguishes his or her position from that of others	Determine an author's point of view or purpose in a text and analyze how the author acknowledges and responds to conflicting evidence or viewpoints
Integration of Knowledge and Ideas	Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.	5.RI.7 Interpret information presented visually, orally, or quantitatively (e.g., in charts, graphs, diagrams, timelines, animations, or interactive elements on webpages) and explain how the information contributes to an understanding of the text in which it appears.	Integrate information presented in different media or formats (e.g., in charts, graphs, photographs, videos, maps) as well as in words to develop a coherent understanding of a topic or issue.	Compare and contrast a written text to an audio, video, or multimedia version, analyzing each medium's portrayal of the subject (e.g., how the delivery of a speech affects the impact of the words).	Evaluate the advantages and disadvantages of using different mediums (e.g., print or digital text, video, multimedia) to present a particular topic or idea.
	Delineate and evaluate the argument and specific claims in a text, including the validity of the reasoning as well as the relevance and sufficiency of the evidence.	5.RI.8 Explain how an author uses reasons and evidence to support particular points in a text, identifying which reasons and evidence support which point(s).	Trace and evaluate the argument and specific claims in a text, distinguishing claims that are supported by reasons and evidence from claims that are not.	Trace and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient to support the claims.	Delineate and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient; recognize when irrelevant evidence is introduced.

	Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.	5.RI.9 Integrate information from several texts on the same topic in order to write or speak knowledgeably about the subject.	Compare and contrast one author's presentation of events with that of another (e.g., a memoir written by and a biography on the same person).	Analyze how two or more authors writing about the same topic shape their presentations of key information by emphasizing different evidence or advancing different interpretations of facts.	Analyze a case in which two or more texts provide conflicting information on the same topic and identify where the texts disagree on matters of fact or interpretation.
Range of Reading and Level of Text Complexity	Independently and proficiently read and comprehend complex literary and informational texts	5.RI.10 Independently and proficiently read and comprehend informational texts, including history/social studies, science, mathematical, and technical texts, exhibiting complexity appropriate for at least grade 5.	Independently and proficiently read and comprehend literary nonfiction representing a variety of genres, cultures, and perspectives and exhibiting complexity appropriate for at least grade 6.	Independently and proficiently read and comprehend literary nonfiction representing a variety of genres, cultures, and perspectives and exhibiting complexity appropriate for at least grade 7.	Independently and proficiently read and comprehend literary nonfiction representing a variety of genres, cultures, and perspectives and exhibiting complexity appropriate for at least grade 8.

ENGLISH LANGUAGE ARTS STANDARDS - 5-8TH GRADE ALIGNMENT					
Topic	Anchor Standard	5th Grade	6th Grade	7th Grade	8th Grade
Writing	Writing Standards				
Text Types and Purposes	Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence.	5.W.1 Write argument pieces on topics or texts, supporting a point of view with reasons and information. a. Introduce a claim or text clearly, state an opinion, and create an organizational structure in which ideas are logically grouped to support the writer's purpose. b. Provide logically ordered reasons that are supported by facts and details. c. Link opinion and reasons using words, phrases, and clauses (e.g., consequently, specifically). d. Provide a concluding statement or section related to the opinion presented.	Write arguments (e.g., essays, letters to the editor, advocacy speeches) to support claims with clear reasons and relevant evidence. a. Introduce claim(s) and organize the reasons and evidence clearly in paragraphs and sections. b. Support claim(s) with clear reasons and relevant evidence, using credible sources and demonstrating an understanding of the topic or text. c. Use words, phrases, and clauses to clarify the relationships among claim(s) and reasons. d. Establish and maintain a style appropriate to audience and purpose (e.g., formal for academic writing). e. Provide a concluding statement or section that follows from the	Write arguments (e.g., essays, letters to the editor, advocacy speeches) to support claims with clear reasons and relevant evidence. a. Introduce claim(s), acknowledge alternate or opposing claims, and organize the reasons and evidence logically in paragraphs and sections. b. Support claim(s) with logical reasoning and relevant evidence, using accurate, credible sources and demonstrating an understanding of the topic or text. c. Use words, phrases, and clauses to create cohesion and clarify the relationships among claim(s), reasons, and evidence. d. Establish and maintain a style appropriate to audience and purpose (e.g.,	Write arguments (e.g., essays, letters to the editor, advocacy speeches) to support claims with clear reasons and relevant evidence. a. Introduce claim(s), acknowledge and distinguish the claim(s) from alternate or opposing claims, and organize the reasons and evidence logically in paragraphs and sections. b. Support claim(s) with logical reasoning and relevant evidence, using accurate, credible sources and demonstrating an understanding of the topic or text. c. Use words, phrases, and clauses to create cohesion and clarify the relationships among claim(s), counterclaims, reasons, and evidence.

			argument presented.	formal for academic writing). e. Provide a concluding statement or section that follows from and supports the argument presented.	d. Establish and maintain a style appropriate to audience and purpose (e.g., formal for academic writing). e. Provide a concluding statement or section that follows from and supports the argument presented.
	Write informative/explanatory texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.	5.W.2 Write informative/explanatory texts to examine a topic and convey ideas and information clearly. a. Introduce a topic clearly, provide a general observation and focus, and group related information logically; include formatting (e.g., headings), illustrations, and multimedia when useful to aiding comprehension. b. Develop the topic with facts, definitions, concrete details, quotations, or other information and examples related to the topic. c. Link ideas within and across categories of information using words, phrases, and clauses (e.g., in contrast, especially). d. Use precise language and domain-specific vocabulary to inform about or explain the topic. e. Provide a concluding statement or section related to the information or explanation presented.	Write informative/explanatory texts (e.g., essays, oral reports, biographical feature articles) to examine a topic and convey ideas, concepts, and information through the selection, organization, and analysis of relevant content. a. Introduce a topic; organize ideas, concepts, and information in paragraphs and sections, using strategies such as definition, classification, comparison/contrast, and cause/effect; include text features (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension. b. Develop the topic with relevant facts, definitions, concrete details, quotations, or other information and examples. c. Use appropriate transitions to clarify the relationships among ideas and concepts. d. Use precise language and domain-specific vocabulary to inform about or explain the topic. e. Establish and maintain a style	Write informative/explanatory texts (e.g., essays, oral reports, biographical feature articles) to examine a topic and convey ideas, concepts, and information through the selection, organization, and analysis of relevant content. a. Introduce a topic clearly, previewing what is to follow; organize ideas, concepts, and information in paragraphs and sections, using strategies such as definition, classification, comparison/contrast, and cause/effect; include text features (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension. b. Develop the topic with relevant facts, definitions, concrete details, quotations, or other information and examples. c. Use appropriate transitions to create cohesion and clarify the relationships among ideas and concepts. d. Use precise language and domain-specific vocabulary to inform about or explain the	Write informative/explanatory texts (e.g., essays, oral reports, biographical feature articles) to examine a topic and convey ideas, concepts, and information through the selection, organization, and analysis of relevant content. a. Introduce a topic clearly, previewing what is to follow; use paragraphs and sections to organize ideas, concepts, and information into broader categories; include text features (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension. b. Develop the topic with relevant, well-chosen facts, definitions, concrete details, quotations, or other information and examples. c. Use appropriate and varied transitions to create cohesion and clarify the relationships among ideas and concepts. d. Use precise language and domain-specific vocabulary to inform about or explain the topic. e. Establish and

			appropriate to audience and purpose (e.g., formal for academic writing). f. Provide a concluding statement or section that follows from the information or explanation presented.	topic. e. Establish and maintain a style appropriate to audience and purpose (e.g., formal for academic writing). f. Provide a concluding statement or section that follows from and supports the information or explanation presented.	maintain a style appropriate to audience and purpose (e.g., formal for academic writing). f. Provide a concluding statement or section that follows from and supports the information or explanation presented.
	Write narratives to develop real or imagined experiences or events using effective technique, well-chosen details, and well-structured event sequences.	5.W.3 Write narratives to develop real or imagined experiences or events using effective technique, descriptive details, and clear event sequences. a. Orient the reader by establishing a situation and introducing a narrator and/or characters; organize an event sequence that unfolds naturally. b. Use narrative techniques, such as dialogue, description, and pacing, to develop experiences and events or show the responses of characters to situations. c. Use a variety of transitional words, phrases, and clauses to manage the sequence of events. d. Use concrete words and phrases and sensory details to convey experiences and events precisely. e. Provide a conclusion that follows from the narrated experiences or events.	Write narratives to develop experiences or events using effective literary techniques, relevant descriptive details, and well-structured sequences. a. Engage and orient the reader by establishing a context and introducing a narrator and/or characters; organize an appropriate narrative sequence. b. Use narrative techniques, such as dialogue, pacing, and description, to develop experiences, events, and/or characters. c. Use a variety of transition words, phrases, and clauses to convey sequence and signal shifts from one time frame or setting to another. d. Use precise words and phrases, relevant descriptive details, figurative and sensory language, and techniques such as personification (e.g., “the fog crept in”) to convey experiences or events. e. Provide a conclusion that follows from the narrated experiences or	Write narratives to develop experiences or events using effective literary techniques, relevant descriptive details, and well-structured sequences. a. Engage and orient the reader by establishing a context and point of view and introducing a narrator and/or characters; organize an appropriate narrative sequence. b. Use narrative techniques, such as dialogue, pacing, and description, to develop experiences, events, and/or characters. c. Use a variety of transition words, phrases, and clauses to convey sequence and signal shifts from one time frame or setting to another. d. Use precise words and phrases, relevant descriptive details, and figurative and sensory language to establish a mood that evokes an emotion, to capture action, and to convey experiences or events. e. Provide a conclusion that follows from and reflects on the narrated	Write narratives to develop experiences or events using effective literary techniques, relevant descriptive details, and well-structured sequences. a. Engage and orient the reader by establishing a context and point of view and introducing a narrator and/or characters; organize an appropriate narrative sequence. b. Use narrative techniques, such as dialogue, pacing, description, and reflection, to develop experiences, events, and/or characters. c. Use a variety of transition words, phrases, and clauses to convey sequence, signal shifts from one time frame or setting to another, and show the relationships among experiences and events. d. Use precise words and phrases and relevant descriptive details to convey a tone (the writer’s attitude toward the subject: e.g., humorous, serious, or ironic) and to convey experiences or events.

			events	experiences or events	e. Provide a conclusion that follows from and reflects on the narrated experiences or events.
Production and Distribution of Writing	Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.	5.W.4 Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience.	Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.	Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.	Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.
	Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach.	5.W.5 With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach.	Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach.	Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on how well purpose and audience have been addressed	Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on how well purpose and audience have been addressed.
	Use technology, including the Internet, to produce and publish writing and to interact and collaborate with others.	5.W.6 With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of two pages in a single sitting.	Use technology, including current web-based communication platforms, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of three pages in a single sitting.	Use technology, including current web-based communication platforms, to produce and publish writing and link to and cite sources as well as to interact and collaborate with others.	Use technology, including current web-based communication platforms, to produce and publish writing and present the relationships between information and ideas efficiently as well as to interact and collaborate with others.
Research to Build and Present Knowledge	Conduct short as well as more sustained research projects based on focused questions, demonstrating understanding of the subject under investigation.	5.W.7 Conduct short research projects that use several sources to build knowledge through investigation of different aspects of a topic.	Conduct short as well as more sustained research projects to answer a question, drawing on several sources and refocusing the inquiry when appropriate.	Conduct short as well as more sustained research projects to answer a question, drawing on several sources and generating additional related, focused questions for further research and investigation.	Conduct short as well as more sustained research projects to answer a question (including a self-generated question), drawing on several sources and generating additional related, focused questions that allow for multiple avenues of exploration.
	Gather relevant information from multiple print and digital sources, assess the credibility and accuracy of each source, and integrate the information while avoiding plagiarism.	5.W.8 Recall relevant information from experiences or gather relevant information from print and digital sources; summarize or paraphrase information in notes and finished work, and provide a list of sources.	When conducting research, gather relevant information from multiple print and digital sources; assess the credibility of each source; and quote or paraphrase the data and conclusions of others while avoiding	When conducting research, gather relevant information from multiple print and digital sources, using search terms effectively; assess the credibility and accuracy of each source; and quote or paraphrase the data and	When conducting research, gather relevant information from multiple print and digital sources, using search terms effectively; assess the credibility and accuracy of each source; and quote or

			plagiarism and providing basic bibliographic information for sources.	conclusions of others while avoiding plagiarism and following a standard format for citation.	
	Draw evidence from literary or informational texts to support analysis, reflection, and research.	5.W.9 Draw evidence from literary or informational texts to support analysis, reflection, and research. a. Apply grade 5 Reading standards to literature (e.g., "Compare and contrast two or more characters, settings, or events in a story or a drama, drawing on specific details in the text [e.g., how characters interact]"). b. Apply grade 5 Reading standards to informational texts (e.g., "Explain how an author uses reasons and evidence to support particular points in a text, identifying which reasons and evidence support which point[s]").	Draw evidence from literary or informational texts to support written analysis, interpretation, reflection, and research, applying one or more grade 6 standards for Reading Literature or Reading Informational Text as needed.	Draw evidence from literary or informational texts to support written analysis, interpretation, reflection, and research, applying one or more grade 7 Standards for Reading Literature or Reading Informational Text as needed.	Draw evidence from literary or informational texts to support written analysis, interpretation, reflection, and research, applying one or more grade 8 standards for Reading Literature or Reading Informational Text as needed.
Range of Writing	Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of tasks, purposes, and audiences.	5.W.10 Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.	Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.	Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.	Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.

ENGLISH LANGUAGE ARTS STANDARDS - 5-8TH GRADE ALIGNMENT					
Topic	Anchor Standard	5th Grade	6th Grade	7th Grade	8th Grade
Language	Language Standards				

Conventions of Standard English in Context	Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.	5.L.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Explain the function of conjunctions, prepositions, and interjections in general and their function in particular sentences. b. Form and use the perfect (e.g., I had walked; I have walked; I will have walked) verb tenses. c. Use verb tense to convey various times, sequences, states, and conditions. d. Recognize and correct inappropriate shifts in verb tense. e. Use correlative conjunctions (e.g., either/or, neither/nor).	Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; retain and further develop language skills learned in previous grades. a. Use simple, compound, complex, and compound-complex sentences to communicate ideas clearly and to add variety to writing. b. Explain the function of phrases and clauses in general, how phrases and clauses differ, and how their use conveys a particular meaning in a specific written or spoken sentence. c. Place or rearrange phrases and clauses within a sentence, recognizing and correcting misplaced and dangling modifiers.	Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; retain and further develop language skills learned in previous grades. a. Use phrases and clauses to communicate ideas precisely, with attention to skillful use of verb tenses to add clarity. b. Recognize and correct vague pronouns (those that have unclear or ambiguous antecedents).5 c. Recognize and correct inappropriate shifts in pronoun number and person in sentences with multiple clauses and phrases. d. Recognize that changing the placement of a phrase or clause can add variety, emphasize particular relationships among ideas, or alter the meaning of a sentence or paragraph.	Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; retain and further develop language skills learned in previous grades a. Coordinate phrases and clauses in simple, compound, complex, and compound-complex sentences, with emphasis on agreement of pronouns and their antecedents. b. Form and use verbs in the active and passive voices and the indicative, imperative, interrogative, conditional, and subjunctive moods to communicate a particular meaning.
	Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.	5.L.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Use punctuation to separate items in a series. b. Use a comma to separate an introductory element from the rest of the sentence. c. Use a comma to set off the words yes and no (e.g., Yes, thank you), to set off a tag question from the rest of the sentence (e.g., It's true,	Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Use punctuation (commas, parentheses, dashes) to set off nonrestrictive/parenthetical elements. b. Spell correctly, recognizing that some words have commonly accepted variations (e.g., donut/doughnut).	Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Use a comma to separate coordinate adjectives (e.g., a fascinating, enjoyable movie). b. Spell correctly, recognizing that some words have commonly accepted variations (e.g., donut/doughnut).	Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Use punctuation (comma, ellipsis, dash) to indicate a pause or break. b. Use an ellipsis to indicate an omission. c. Spell correctly, recognizing that some words have commonly accepted variations (e.g., donut/doughnut).

		isn't it?), and to indicate direct address (e.g., Is that you, Steve?). d. Use underlining, quotation marks, or italics to indicate titles of works. e. Spell grade-appropriate words correctly, consulting references as needed.			
Knowledge of Language	Apply knowledge of language to understand how language functions in different contexts, to make effective choices for meaning or style, and to comprehend more fully when reading or listening.	5.L.3 Use knowledge of language and its conventions when writing, speaking, reading, or listening. a. Expand, combine, and reduce sentences for meaning, reader/listener interest, and style. b. Compare and contrast the varieties of English (e.g., dialects, registers) used in stories, dramas, or poems.	Use knowledge of language and its conventions when writing, speaking, reading, or listening. a. Maintain appropriate consistency in style and tone while varying sentence patterns for meaning and audience interest. b. Recognize variations from standard or formal English in writing and speaking, determine their appropriateness for the intended purpose and audience, and make changes as necessary.	Use knowledge of language and its conventions when writing, speaking, reading, or listening. a. Maintain appropriate consistency in style and tone while varying sentence patterns for meaning and audience interest. b. Recognize variations from standard or formal English in writing and speaking, determine their appropriateness for the intended purpose and audience, and make changes as necessary.	Use knowledge of language and its conventions when writing, speaking, reading, or listening. a. Maintain appropriate consistency in style and tone while varying sentence patterns for meaning and audience interest. b. Recognize variations from standard or formal English in writing and speaking, determine their appropriateness for the intended purpose and audience, and make changes as necessary.
Vocabulary Acquisition and Use	Determine or clarify the meaning of unknown and multiple-meaning words and phrases by using context clues, analyzing meaningful word parts, and consulting general and specialized reference materials, as appropriate.	5.L.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 5 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., cause/effect relationships, comparisons in text, role of word in sentence) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek and Latin affixes and roots (specifically prefixes in 5th grade and connection to root) as clues to the meaning of a word (e.g., photograph,	Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 6 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., the overall meaning of a sentence or paragraph; a word's position or function in a sentence) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., audience, auditory, audible). c. c. Consult reference	Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., the overall meaning of a sentence or paragraph; a word's position or function in a sentence) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., belligerent, bellicose, rebel). c. Consult general and	Determine or clarify the meaning of unknown and multiple-meaning words or phrases based on grade 8 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., the overall meaning of a sentence or paragraph; a word's position or function in a sentence) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., precede, recede, secede). c. Consult general and

		photosynthesis). c. Use knowledge of part of speech to clarify the role of the unknown word within the sentence. d. Consult reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation and determine or clarify the precise meaning of key words and phrases.	materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning or its part of speech. d. d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).	specialized reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning or its part of speech. d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).	specialized reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning or its part of speech. d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).
	Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.	5.L.6 Demonstrate understanding of figurative language, word relationships, and nuances in word meanings. a. Interpret figurative language, including similes and metaphors, in context. b. Recognize and explain the meaning of common idioms, adages, and proverbs. c. Use the relationship between particular words (e.g., synonyms, antonyms, homographs) to better understand each of the words.	Demonstrate understanding of figurative language, word relationships, and nuances in word meanings. a. Interpret figures of speech (e.g., personification) in context. b. Use the relationship between particular words (e.g., cause/effect, part/whole, item/category) to better understand each of the words. c. Distinguish among the connotations (associations) of words with similar denotations (definitions) (e.g., stingy, scrimping, economical, unwasteful, thrifty).	Demonstrate understanding of figurative language, word relationships, and nuances in word meanings. a. Interpret figures of speech (e.g., literary, biblical, mythological allusions) in context. b. Use the relationship between particular words (e.g., synonym/antonym, analogy) to better understand each of the words. c. Distinguish among the connotations (associations) of words with similar denotations (definitions) (e.g., refined, respectful, polite, diplomatic, condescending).	Demonstrate understanding of figurative language, word relationships, and nuances in word meanings. a. Interpret figures of speech (e.g. verbal irony, puns) in context. b. Use the relationship between particular words to better understand each of the words. c. Distinguish among the connotations (associations) of words with similar denotations. (definitions) (e.g., bullheaded, willful, firm, persistent, resolute).
	Acquire and use accurately a range of general academic and domain- specific words and phrases sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in gathering vocabulary	5.L.7 Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases, including those that signal contrast, addition, and other logical relationships (e.g.,however, although, nevertheless, similarly,	Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases; independently research words and gather vocabulary knowledge.	Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases; independently research words and gather vocabulary knowledge.	Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases; independently research words and gather vocabulary knowledge.

	knowledge.	moreover, in addition).			

ENGLISH LANGUAGE ARTS STANDARDS - 5-8TH GRADE ALIGNMENT					
Topic	Anchor Standard	5th Grade	6th Grade	7th Grade	8th Grade
Listening/ Speaking	Listening and Speaking Standards				
Comprehension and Collaboration	Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on others' ideas and expressing their own clearly and persuasively.	5.L.S.1 Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacherled) with diverse partners on grade 5 topics and texts, building on others' ideas and expressing their own clearly. a. Come to discussions prepared, having read or studied required material; explicitly draw on that preparation and other information known about the topic to explore ideas under discussion. b. Follow agreed-upon norms for discussions, including speaking audibly, and carry out assigned roles. c. Pose and respond to specific questions by making comments that contribute to the discussion and elaborate on the remarks of others. d. Review the key ideas expressed and draw conclusions in light of information and knowledge gained from the discussions	Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 6 topics, texts, and issues, building on others' ideas and expressing their own clearly. a. Come to discussions prepared, having read or studied required material; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion. (See grade 6 Reading Literature Standard 1 and Reading Informational Text Standard 1 for specific expectations regarding the use of textual evidence.) b. Follow rules for collegial discussions, set specific goals and deadlines, and define individual roles as needed. c. Pose and respond to specific questions with elaboration and detail by making comments that contribute to the topic, text, or issue under discussion. d. Review the key ideas expressed and demonstrate understanding of multiple perspectives through reflection and paraphrasing.	Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 7 topics, texts, and issues, building on others' ideas and clearly expressing their own. a. Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion. (See grade 7 Reading Literature Standard 1 and Reading Informational Text Standard 1 for specific expectations regarding the use of textual evidence.) b. Follow rules for collegial discussions, track progress toward specific goals and deadlines, and define individual roles as needed. c. Pose questions that elicit elaboration and respond to others' questions and comments with relevant observations and ideas that bring the discussion back on topic as needed. d. Acknowledge new information expressed by others and, when warranted, modify their own views.	Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 8 topics, texts, and issues, building on others' ideas and expressing their own clearly. a. Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion. (See grade 8 Reading Literature Standard 1 and Reading Informational Text Standard 1 for specific expectations regarding the use of textual evidence.) b. Follow rules for collegial discussions and decision making, track progress toward specific goals and deadlines, and define individual roles as needed. c. Pose questions that connect the ideas of several speakers and respond to others' questions and comments with relevant evidence, observations, and ideas. d. Acknowledge new information expressed by others, and, when warranted, qualify or justify their own views in light of the

					evidence presented.
	Integrate and evaluate information presented in diverse media and formats, including visually, quantitatively, and orally.	5.L.S.2 Summarize a written text read aloud or information presented in diverse media and formats, including visually, quantitatively, and orally.	Interpret information presented in diverse media and formats (e.g., visually, quantitatively, orally) and explain how it contributes to a topic, text, or issue under study.	Analyze the main ideas and supporting details presented in diverse media and formats (e.g., visually, quantitatively, orally) and explain how the ideas clarify a topic, text, or issue under study.	Analyze the purpose of information presented in diverse media and formats (e.g., visually, quantitatively, orally) and evaluate the motives (e.g., social, commercial, political) behind its presentation
	Evaluate a speaker's point of view, reasoning, and use of evidence and rhetoric.	5.L.S.3 Summarize the points a speaker makes and explain how each claim is supported by reasons and evidence.	Interpret information presented in diverse media and formats (e.g., visually, quantitatively, orally) and explain how it contributes to a topic, text, or issue under study.	Delineate a speaker's argument and specific claims, evaluating the soundness of the reasoning and the relevance and sufficiency of the evidence.	Delineate a speaker's argument and specific claims, evaluating the soundness of the reasoning and relevance and sufficiency of the evidence and identifying when irrelevant evidence is introduced.
Presentation of Knowledge and Ideas	Present information, findings, and supporting evidence such that listeners can follow the line of reasoning and the organization, development, and style are appropriate to task, purpose, and audience.	5.L.S.4 Report on a topic or text or present an opinion, sequencing ideas logically and using appropriate facts and relevant, descriptive details to support main ideas or themes; speak clearly at an understandable pace.	Present claims and findings, sequencing ideas logically and using pertinent descriptions, facts, and details to accentuate main ideas or themes; use appropriate vocabulary, eye contact, volume, and pronunciation.	Present claims and findings, emphasizing salient points in a focused, coherent manner with pertinent descriptions, facts, details, and examples; use appropriate vocabulary, eye contact, volume, and pronunciation.	Present claims and findings, emphasizing salient points in a focused, coherent manner with relevant evidence, sound valid reasoning, and well-chosen details; use appropriate vocabulary, eye contact, volume, and pronunciation. S
	Make strategic use of digital media and visual displays of data to express information and enhance understanding of presentations.	5.L.S.5 Include multimedia components (e.g., graphics, sound) and visual displays in presentations when appropriate to enhance the development of main ideas or themes.	Include multimedia components and visual displays in presentations to clarify information.	Include multimedia components and visual displays in presentations to clarify claims and findings and emphasize salient points.	Integrate multimedia components and visual displays into presentations to clarify information, strengthen claims and evidence, and add interest.
	Adapt speech to a variety of contexts and communicative tasks, demonstrating command of formal English when indicated or appropriate.	5.L.S.6 Adapt speech to a variety of contexts and tasks, using formal English when appropriate to task and situation.	Adapt speech to a variety of contexts and tasks, demonstrating command of formal English when indicated or appropriate.	Adapt speech to a variety of contexts and tasks, demonstrating command of formal English when indicated or appropriate.	Adapt speech to a variety of contexts and tasks, demonstrating command of formal English when indicated or appropriate.

MATH STANDARDS - 5-8TH GRADE ALIGNMENT	
Topic	***5th Grade***
Operations and Algebraic Thinking	
5.OA.A Write and interpret numerical	1. Use parentheses, brackets, or braces in numerical expressions, and evaluate expressions with these symbols, e.g.,(6 x 30) + (6 x ½).

expressions	2. Write simple expressions that record calculations with numbers, and interpret numerical expressions without evaluating them. For example, express the calculation “Add 8 and 7, then multiply by 2” as 2 × (8 + 7). Recognize that 3 × (18932 + 921) is three times as large as 18932 + 921, without having to calculate the indicated sum or product.
5.OA.B Analyze patterns and relationships	3. Generate two numerical patterns using two given rules. Identify apparent relationships between corresponding terms. Form ordered pairs consisting of corresponding terms from the two patterns, and graph the ordered pairs on a coordinate plane. For example, given the rule “Add 3” and the starting number 0, and given the rule “Add 6” and the starting number 0, generate terms in the resulting sequences, and observe that the terms in one sequence are twice the corresponding terms in the other sequence. Explain informally why this is so.
Topic	***5th Grade***
Number and Operations in Base Ten	
5.NBT.A Understand the place value system	1. Recognize that in a multi-digit number, including decimals, a digit in any place represents 10 times as much as it represents in the place to its right and ⅒ of what it represents in the place to its left.
	2. Explain patterns in the number of zeros of the product when multiplying a number by powers of 10, and explain patterns in the placement of the decimal point when a decimal is multiplied or divided by a power of 10. Use whole-number exponents to denote powers of 10.
	3. Read, write, and compare decimals to thousandths. a. Read and write decimals to thousandths using base-ten numerals, number names, and expanded form, e.g., 347.392 = 3 × 100 + 4 × 10 + 7 ×1 + 3 × (⅒) + 9 × (⅒₀₀) + 2 × (⅒₀₀₀). b. Compare two decimals to thousandths based on meanings of the digits in each place, using >, =, and < symbols to record the results of comparisons.
	4. Use place value understanding to round decimals to any place
5.NBT.B Perform operations with multi-digit whole numbers and with decimals to hundredths	5. Fluently multiply multi-digit whole numbers. (Include two-digit x four- digit numbers and, three-digit x three-digit numbers) using the standard algorithm.
	6. Find whole-number quotients of whole numbers with up to four-digit dividends and two-digit divisors, using strategies based on place value, the properties of operations, and/or the relationship between multiplication and division. Illustrate and explain the calculation by using equations, rectangular arrays, and/or area models.
	7. Add, subtract, multiply, and divide decimals to hundredths, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction and between multiplication and division; relate the strategy to a written method and explain the reasoning used.
Topic	***5th Grade***
Number and Operations -- Fractions	
5.NF.A Use equivalent fractions as a strategy to add and subtract fractions	1. Add and subtract fractions with unlike denominators (including mixed numbers) by replacing given fractions with equivalent fractions in such a way as to produce an equivalent sum or difference of fractions with like denominators. For example, ⅔ + ¾ =8/12 + ⁹⁄₁₂ = ²³⁄₁₂. (In general, a⁄b + c⁄d = (ad + bc)⁄bd.)
	2. Solve word problems involving addition and subtraction of fractions referring to the same whole (the whole can be a set of objects), including cases of unlike denominators, e.g., by using visual fraction models or equations to represent the problem. Use benchmark fractions and number sense of fractions to estimate mentally and assess the reasonableness of answers. For example, recognize an incorrect result ⅖ + ½ = ⅗, by observing that ⅖ < ½
5.NF.B Apply and extend previous understandings of multiplication and division to multiply and divide fractions	3. Interpret a fraction as division of the numerator by the denominator (a⁄b = a ÷ b). Solve word problems involving division of whole numbers leading to answers in the form of fractions or mixed numbers, e.g., by using visual fraction models or equations to represent the problem. For example, interpret ¾ as the result of dividing 3 by 4, noting that ¾ multiplied by 4 equals 3, and that when three wholes are shared equally among four people each person has a share of size ¾. If nine people want to share a 50-pound sack of rice equally by weight, how many pounds of rice should each person get? Between what two whole numbers does your answer lie?

	4. Apply and extend previous understandings of multiplication to multiply a fraction or whole number by a fraction. a. Interpret the product (a⁄b) × q as a parts of a partition of q into b equal parts; equivalently, as the result of a sequence of operations a × q ÷ b. For example, use a visual fraction model and/or area model to show (⅔) × 4 =⅝, and create a story context for this equation. Do the same with (⅔) × (⅘) = ⅘ . (In general, (a⁄b) × (c⁄d) = ac⁄bd.) b. Find the area of a rectangle with fractional side lengths by tiling it with unit squares of the appropriate unit fraction side lengths, and show that the area is the same as would be found by multiplying the side lengths. Multiply fractional side lengths to find areas of rectangles, and represent fraction products as rectangular areas.
	5. Interpret multiplication as scaling (resizing), by: a. Comparing the size of a product to the size of one factor on the basis of the size of the other factor, without performing the indicated multiplication. For example, without multiplying tell which number is greater: 225 or ¾x 225; ¹⁄₅₀ or ⅗ x ¹⁄₅₀? b. Explaining why multiplying a given number by a fraction greater than 1 results in a product greater than the given number (recognizing multiplication by whole numbers greater than 1 as a familiar case); explaining why multiplying a given number by a fraction
	6. Solve real-world problems involving multiplication of fractions and mixed numbers, e.g., by using visual fraction models or equations to represent the problem.
	7. Apply and extend previous understandings of division to divide unit fractions by whole numbers and whole numbers by unit fractions.21 a. Interpret division of a unit fraction by a non-zero whole number, and compute such quotients. For example, create a story context for (⅓) ÷ 4, and use a visual fraction model to show the quotient. Use the relationship between multiplication and division to explain that (⅓) ÷ 4 = ¹⁄₁₂ because (¹⁄₁₂) ÷ 4 = ⅓. b. Interpret division of a whole number by a unit fraction, and compute such quotients. For example, create a story context for 4 ÷ (⅕), and use a visual fraction model to show the quotient. Use the relationship between multiplication and division to explain that 4 ÷ (⅕) = 20 because 20 ÷ (⅕) = 4.
Topic	***5th Grade***
Measurement and Data	
5.MD.A Convert like measurement units within a given measurement system	1. Convert among different-sized standard measurement units within a given measurement system (e.g., convert 5 cm to 0.05 m), and use these conversions in solving multi-step, real-world problems.
5.MD.B Represent and interpret data	2. Make a line plot (dot plot) to display a data set of measurements in fractions of a unit. Use operations on fractions for this grade to solve problems involving information presented in line plot (dot plot). For example, given different measurements of liquid in identical beakers, find the amount of liquid each beaker would contain if the total amount in all the beakers were redistributed equally.
5.MD.C Geometric measurement: Understand concepts of volume and relate volume to multiplication and addition	3. Recognize volume as an attribute of solid figures and understand concepts of volume measurement. a. A cube with side length 1 unit, called a “unit cube,” is said to have “one cubic unit” of volume, and can be used to measure volume. b. A solid figure which can be packed without gaps or overlaps using n unit cubes is said to have a volume of n cubic units.
	4. Measure volumes by counting unit cubes, using cubic cm, cubic in., cubic ft., and non-standard units.
	5. Relate volume to the operations of multiplication and addition and solve real-world and mathematical problems involving volume. a. Find the volume of a right rectangular prism with whole-number edge lengths by packing it with unit cubes, and show that the volume is the same as would be found by multiplying the edge lengths, equivalently by multiplying the height by the area of the base. Represent threefold whole-number products as volumes, e.g., to represent the associative property of multiplication. b. Apply the formula V = l × w × h and V = B × h (where B stands for the area of the base) for rectangular prisms to find volumes of right rectangular prisms with whole-number edge lengths in the context of solving real-world and mathematical problems. c. Recognize volume as additive. Find volumes of solid figures composed of two non-overlapping right rectangular

	prisms by adding the volumes of the non-overlapping parts, applying this technique to solve real-world problems.
Topic	***5th Grade***
Geometry	
5.G.A Graph points on the coordinate plane to solve real-world and mathematical problems	1. Use a pair of perpendicular number lines, called axes, to define a coordinate system, with the intersection of the lines (the origin) arranged to coincide with the zero on each line and a given point in the plane located by using an ordered pair of numbers, called its coordinates. Understand that the first number indicates how far to travel from the origin in the direction of one axis, and the second number indicates how far to travel in the direction of the second axis, with the convention that the names of the two axes and the coordinates correspond (e.g., x-axis and x-coordinate, y-axis and y-coordinate).
	2. Represent real-world and mathematical problems by graphing points in the first quadrant of the coordinate plane, and interpret coordinate values of points in the context of the situation.
5.G.B Classify two-dimensional figures into categories based on their properties.	3. Understand that attributes belonging to a category of two- dimensional figures also belong to all subcategories of that category. For example, all rectangles have four right angles and squares are rectangles, so all squares have four right angles
	4. Classify two-dimensional figures in a hierarchy based on properties. For example, all rectangles are parallelograms because they are all quadrilaterals with two pairs of opposite sides parallel.

MATH STANDARDS - 5-8TH GRADE ALIGNMENT	
Topic	**6th Grade**
Ratios and Proportional Relationships	
6.RP.A Understand ratio and rate concepts and use ratio reasoning to solve problems	1. Understand the concept of a ratio including the distinctions between part:part and part:whole and the value of a ratio; part/part and part/whole. Use ratio language to describe a ratio relationship between two quantities. For example, The ratio of wings to beaks in the bird house at the zoo was 2:1, because for every two wings there was one beak; For every vote candidate A received, candidate C received nearly three votes, meaning that candidate C received three out of every four votes or ¾ of all votes.
	2. Understand the concept of a unit rate a/b associated with a ratio a:b with b ≠ 0, and use rate language in the context of a ratio relationship, including the use of units. For example, This recipe has a ratio of three cups of flour to four cups of sugar, so there is ¾ cup of flour for each cup of sugar; We paid $75 for 15 hamburgers, which is a rate of five dollars per hamburger.
	3. Use ratio and rate reasoning to solve real-world and mathematical problems, e.g., by reasoning about tables of equivalent ratios, tape diagrams, double number line diagrams, or equations. a. Make tables of equivalent ratios relating quantities with whole- number measurements. Find missing values in the tables, and plot the pairs of values on the coordinate plane. Use tables to compare ratios. b. Solve unit rate problems, including those involving unit pricing, and constant speed. For example, if it took seven hours to mow four lawns, then, at that rate, how many lawns could be mowed in 35 hours? At what rate were lawns being mowed? c. Find a percent of a quantity as a rate per 100 (e.g., 30% of a quantity means ³⁰⁄₁₀₀ times the quantity); solve problems involving finding the whole, given a part and the percent. d. Use ratio reasoning to convert measurement units within and between measurement systems; manipulate and transform units appropriately when multiplying or dividing quantities. For example,
Topic	**6th Grade**
The Number System	
6.NS.A Apply and extend previous understandings of multiplication and division to divide fractions by fractions	1. Interpret and compute quotients of fractions, and solve word problems involving division of fractions by fractions, e.g., by using visual fraction models and equations to represent the problem. For example, create a story context for (⅔) ÷ (¾) and use a visual fraction model to show the quotient; use the relationship between multiplication and division to explain that (⅔) ÷ (¾) = ⅘ because ¾ of ⅘ is ⅔. In general, (a⁄b) ÷ (c⁄d) = ad⁄bc. How much chocolate will each person get if three people share 1 ½ lb. of chocolate equally? How many 3 ¼-cup servings are in ⅔ of a cup of yogurt? How wide is a rectangular strip of land with length ¾ mile and area ½ square mile?
6.NS.B Compute fluently with multi-	2. Fluently divide multi-digit numbers using the standard algorithm.
	3. Fluently add, subtract, multiply, and divide multi-digit decimals using the standard algorithm for each operation.

digit numbers and find common factors and multiples	4. Use prime factorization to find the greatest common factor of two whole numbers less than or equal to 100 and the least common multiple of two whole numbers less than or equal to 12. Use the distributive property to express a sum of two whole numbers 1–100 with a common factor as a multiple of a sum of two relatively prime numbers. For example, express 36 + 8 as 4(9 + 2).
6.NS.C Apply and extend previous understandings of numbers to the system of rational numbers	5. Understand that positive and negative numbers are used together to describe quantities having opposite directions or values (e.g., temperature above/below zero, elevation above/below sea level, credits/debits, and positive/negative electric charge). Use positive and negative numbers (whole numbers, fractions, and decimals) to represent quantities in real-world contexts, explaining the meaning of zero in each situation.
	6. Understand a rational number as a point on the number line. Extend number line diagrams and coordinate axes familiar from previous grades to represent points on the line and in the plane with negative number coordinates. a. Recognize opposite signs of numbers as indicating locations on opposite sides of 0 on the number line; recognize that the opposite of the opposite of a number is the number itself, e.g., –(–3) = 3, and that zero is its own opposite. b. Understand signs of numbers in ordered pairs as indicating locations in quadrants of the coordinate plane; recognize that when two ordered pairs differ only by signs, the locations of the points are related by reflections across one or both axes. c. Find and position integers and other rational numbers on a horizontal or vertical number line diagram; find and position pairs of integers and other rational numbers on a coordinate plane.
	7. Understand ordering and absolute value of rational numbers. a. Interpret statements of inequality as statements about the relative positions of two numbers on a number line diagram. For example, interpret –3 > –7 as a statement that –3 is located to the right of –7 on a number line oriented from left to right. b. Write, interpret, and explain statements of order for rational numbers in real-world contexts. c. Understand the absolute value of a rational number as its distance from 0 on the number line; interpret absolute value as magnitude for a positive or negative quantity in a real-world situation. For example, for an account balance of –30 dollars, write |–30| = 30 to describe the size of the debt in dollars. d. Distinguish comparisons of absolute value from statements about order. For example, recognize that an account balance less than –30 dollars represents a debt greater than 30 dollars.
	8. Solve real-world and mathematical problems by graphing points in all four quadrants of the coordinate plane. Include use of coordinates and absolute value to find distances between points with the same first coordinate or the same second coordinate.
Topic	**6th Grade**
Expressions and Equations	
6.EE.A Apply and extend previous understandings of arithmetic to algebraic expressions	1. Write and evaluate numerical expressions involving whole-number exponents.
	2. Write, read, and evaluate expressions in which letters stand for numbers. a. Write expressions that record operations with numbers and with letters standing for numbers. For example, express the calculation “Subtract y from 5” as 5 – y. b. Identify parts of an expression using mathematical terms (sum, term, product, factor, quotient, and coefficient); view one or more parts of an expression as a single entity. For example, describe the expression 2(8 + 7) as a product of two factors; view (8 + 7) as both a single entity and a sum of two terms. c. Evaluate expressions at specific values of their variables. Include expressions that arise from formulas used in real-world problems. Perform arithmetic operations, including those involving whole-number exponents, in the conventional order when there are no parentheses to specify a particular order (Order of Operations).
	3. Apply the properties of operations to generate equivalent expressions. For example, apply the distributive property to the expression 3(2 + x) to produce the equivalent expression 6 + 3x; apply the distributive property to the expression 24x + 18y to produce the equivalent expression 6(4x + 3y); apply properties of operations to y + y + y to produce the equivalent expression 3y.
	4. Identify when two expressions are equivalent (i.e., when the two expressions name the same number regardless of which value is substituted into them). For example, the expressions y + y + y and 3y are equivalent because they name the same number regardless of which number y stands for.
6.EE.B Reason about and solve one-variable equations and inequalities	5. Understand solving an equation or inequality as a process of answering a question: Which values from a specified set, if any, make the equation or inequality true? Use substitution to determine whether a given number in a specified set makes an equation or inequality true.
	6. Use variables to represent numbers and write expressions when solving a real-world or mathematical problem; understand that a variable can represent an unknown number, or, depending on the purpose at hand, any number in a

	specified set.
	7. Solve real-world and mathematical problems by writing and solving equations of the form x + p = q and px = q for cases in which p, q, and x are all nonnegative rational numbers.
	8. Write an inequality of the form x > c or x < c to represent a constraint or condition in a real-world or mathematical problem. Recognize that inequalities of the form x > c or x < c have infinitely many solutions; represent solutions of such inequalities on number line diagrams.
6.EE.C Represent and analyze quantitative relationships between dependent and independent variables	9. Use variables to represent two quantities in a real-world problem that change in relationship to one another; write an equation to express one quantity, thought of as the dependent variable, in terms of the other quantity, thought of as the independent variable. Analyze the relationship between the dependent and independent variables using graphs and tables, and relate these to the equation. For example, in a problem involving motion at constant speed, list and graph ordered pairs of distances and times, and write the equation d = 65t to represent the relationship between distance and time.
Topic	**6th Grade**
Statistics and Probability	
6.SP.A Develop understanding of statistical variability	1. Recognize a statistical question as one that anticipates variability in the data related to the question and accounts for it in the answers. For example, "How old am I?" is not a statistical question, but "How old are the students in my school?" is a statistical question because one anticipates variability in students' ages.
	2. Understand that a set of data collected to answer a statistical question has a distribution, which can be described by its center (median, mean, and/or mode), spread (range, interquartile range), and overall shape.
	3. Recognize that a measure of center for a numerical data set summarizes all of its values with a single number, while a measure of variation describes how its values vary with a single number.
6.SP.B Summarize and describe distributions	4. Display numerical data in plots on a number line, including dot plots, histograms, and box plots. a. Read and interpret circle graphs.
	5. Summarize numerical data sets in relation to their context, such as by: a. Reporting the number of observations. b. Describing the nature of the attribute under investigation, including how it was measured and its units of measurement. c. Giving quantitative measures of center (median, and/or mean) and variability (range and/or interquartile range), as well as describing any overall pattern and any striking deviations from the overall pattern with reference to the context in which the data were gathered. d. Relating the choice of measures of center and variability to the shape of the data distribution and the context in which the data were gathered.
Topic	**6th Grade**
Geometry	
6.G.A Solve real-world mathematical problems involving area, surface area, and volume	1. Find the area of right triangles, other triangles, special quadrilaterals, and polygons by composing into rectangles or decomposing into triangles and other shapes; apply these techniques in the context of solving real-world and mathematical problems.
	2. Find the volume of a right rectangular prism with fractional edge lengths by packing it with unit cubes of the appropriate unit fraction edge lengths, and show that the volume is the same as would be found by multiplying the edge lengths of the prism. Apply the formulas V = lwh and V = Bh to find volumes of right rectangular prisms with fractional edge lengths in the context of solving real-world and mathematical problems.
	3. Draw polygons in the coordinate plane given coordinates for the vertices; use coordinates to find the length of a side joining points with the same first coordinate or the same second coordinate. Apply these techniques in the context of solving real-world and mathematical problems.
	4. Represent three-dimensional figures using nets made up of rectangles and triangles, and use the nets to find the surface areas of these figures. Apply these techniques in the context of solving real- world and mathematical problems.

MATH STANDARDS - 5-8TH GRADE ALIGNMENT	
Topic	**7th Grade**
Ratios and Proportional Relationships	

7.RP.A Analyze proportional relationships and use them to solve real-world and mathematical problems	1. Compute unit rates associated with ratios of fractions, including ratios of lengths, areas, and other quantities measured in like or different units. For example, if a person walks ½ mile in each ¼ hour, compute the unit rate as the complex fraction ½/¼ miles per hour, equivalently 2 miles per hour
	2. Recognize and represent proportional relationships between quantities. a. Decide whether two quantities are in a proportional relationship, e.g., by testing for equivalent ratios in a table, or graphing on a coordinate plane and observing whether the graph is a straight line through the origin. b. Identify the constant of proportionality (unit rate) in tables, graphs, equations, diagrams, and verbal descriptions of proportional relationships. c. Represent proportional relationships by equations. For example, if total cost t is proportional to the number n of items purchased at a constant price p, the relationship between the total cost and the number of items can be expressed as t = pn. d. Explain what a point (x, y) on the graph of a proportional relationship means in terms of the situation, with special attention to the points (0, 0) and (1, r) where r is the unit rate.
	3. Use proportional relationships to solve multi-step ratio, rate, and percent problems. For example: simple interest, tax, price increases and discounts, gratuities and commissions, fees, percent increase and decrease, percent error.
Topic	**7th Grade**
The Number System	
7.NS>A A. Apply and extend previous understandings of operations with fractions to add, subtract, multiply, and divide rational numbers.	1. Apply and extend previous understandings of addition and subtraction to add and subtract integers and other rational numbers; represent addition and subtraction on a horizontal or vertical number line diagram. a. Describe situations in which opposite quantities combine to make zero. For example, A hydrogen atom has zero charge because its two constituents are oppositely charged; If you open a new bank account with a deposit of $30 and then withdraw $30, you are left with a $0 balance. b. Understand p + q as the number located a distance |q| from p, in the positive or negative direction depending on whether q is positive or negative. Show that a number and its opposite have a sum of 0 (are additive inverses). Interpret sums of rational numbers by describing real world contexts. c. Understand subtraction of rational numbers as adding the additive inverse, p – q = p + (–q). Show that the distance between two rational numbers on the number line is the absolute value of their difference, and apply this principle in real-world contexts. d. Apply properties of operations as strategies to add and subtract rational numbers.
	2. Apply and extend previous understandings of multiplication and division and of fractions to multiply and divide integers and other rational numbers. a. Understand that multiplication is extended from fractions to rational numbers by requiring that operations continue to satisfy the properties of operations, particularly the distributive property, leading to products such as (–1)(–1) = 1 and the rules for multiplying signed numbers. Interpret products of rational numbers by describing real-world contexts. b. Understand that integers can be divided, provided that the divisor is not zero, and every quotient of integers (with non-zero divisor) is a rational number. If p and q are integers, then –(p/q) = (–p)/q = p/(–q). Interpret quotients of rational numbers by describing real-world contexts. c. Apply properties of operations as strategies to multiply and divide rational numbers. d. Convert a rational number to a decimal using long division; know that the decimal form of a rational number terminates in 0s or eventually repeats.
	3. Solve real-world and mathematical problems involving the four operations with integers and other rational numbers
Topic	**7th Grade**
Expressions and Equations	
7.EE.A Use properties of operations to generate equivalent expressions.	1. Apply properties of operations to add, subtract, factor, and expand linear expressions with rational coefficients. For example, 4x + 2 = 2(2x +1) and -3(x –⅔) = -3x + 5.
	2. Understand that rewriting an expression in different forms in a problem context can shed light on the problem and how the quantities in it are related. For example, a + 0.05a = 1.05a means that “increase by 5%” is the same as “multiply by 1.05.” A shirt at a clothing store is on sale for 20% off the regular price, “p”. The discount can be expressed as 0.2p. The new price for the shirt can be expressed as p – 0.2p or 0.8p.

	3. Solve multi-step real-life and mathematical problems posed with positive and negative rational numbers in any form (whole numbers, fractions, and decimals), using tools strategically. Apply properties of operations to calculate with numbers in any form; convert between forms as appropriate; and assess the reasonableness of answers using mental computation and estimation strategies. For example, if a woman making $25 an hour gets a 10% raise, she will make an additional 1 ⁄₁₀ of her salary an hour, or $2.50, for a new salary of $27.50. If you want to place a towel bar 9¾ inches long in the center of a door that is 27½ inches wide, you will need to place the bar about 9 inches from each edge; This estimate can be used as a check on the exact computation
7.EE.B Solve real- life and mathematical problems using numerical and algebraic expressions and equations.	4. Use variables to represent quantities in a real-world or mathematical problem, and construct simple equations and inequalities to solve problems by reasoning about the quantities. a. Solve word problems leading to equations of the form px + q = r and px ÷ q) = r, where p, q, and r are specific rational numbers. Solve equations of these forms fluently. Compare an algebraic solution to an arithmetic solution, identifying the sequence of the operations used in each approach. For example, the perimeter of a rectangle is 54 cm. Its length is 6 cm. What is its width? b. Solve word problems leading to inequalities of the form px + q > r or px + q < r, where p, q, and r are specific rational numbers. Graph the solution set of the inequality and interpret it in the context of the problem. For example, as a salesperson, you are paid $50 per week plus $3 per sale. This week you want your pay to be at least $100. Write an inequality for the number of sales you need to make, and describe the solutions. c. Extend analysis of patterns to include analyzing, extending, and determining an expression for simple arithmetic and geometric sequences (e.g., compounding, increasing area), using tables, graphs, words, and expressions.
Topic	**7th Grade**
Statistics and Probability	
7.SP.A Use random sampling to draw inferences about a population.	1. Understand that statistics can be used to gain information about a population by examining a sample of the population; Generalizations about a population from a sample are valid only if the sample is representative of that population. Understand that random sampling tends to produce representative samples and support valid inferences.
	2. Use data from a random sample to draw inferences about a population with an unknown characteristic of interest. Generate multiple samples (or simulated samples) of the same size to gauge the variation in estimates or predictions. For example, estimate the mean word length in a book by randomly sampling words from the book; predict the winner of a school election based on randomly sampled survey data. Gauge how far off the estimate or prediction might be.
7.SP.B Draw informal comparative inferences about two populations	3. Informally assess the degree of visual overlap of two numerical data distributions with similar variabilities, measuring the difference between the centers by expressing it as a multiple of a measure of variability. For example, the mean height of players on the basketball team is 10 cm greater than the mean height of players on the soccer team and both distributions have similar variability (mean absolute deviation) of about 5 cm. The difference between the mean heights of the two teams (10 cm) is about twice the variability (5 cm) on either team. On a dot plot, the separation between the two distributions of heights is noticeable.
	4. Use measures of center and measures of variability for numerical data from random samples to draw informal comparative inferences about two populations. For example, decide whether the words in a chapter of a seventh-grade science book are generally longer than the words in a chapter of a fourth-grade science book.
7.SP.C Investigate chance processes and develop, use, and evaluate probability models.	5. Understand that the probability of a chance event is a number between 0 and 1 that expresses the likelihood of the event occurring. Larger numbers indicate greater likelihood. A probability near 0 indicates an unlikely event, a probability around ½ indicates an event that is neither unlikely nor likely, and a probability near 1 indicates a likely event.
	6. Approximate the probability of a chance event by collecting data on the chance process that produces it and observing its long-run relative frequency, and predict the approximate relative frequency given the probability. For example, when rolling a number cube 600 times, predict that a 3 or 6 would be rolled roughly 200 times, but probably not exactly 200 times
	7. Develop a probability model and use it to find probabilities of events. Compare probabilities from a model to observed frequencies; if the agreement is not good, explain possible sources of the discrepancy. a. Develop a uniform probability model by assigning equal probability to all outcomes, and use the model to determine probabilities of events. For example, if a student is selected at random from a class, find the probability that Jane will be selected and the probability that a girl will be selected. b. Develop a probability model (which may not be uniform) by observing frequencies in data generated from a chance process. For example, find the approximate probability that a spinning penny will land heads up or that a tossed paper cup will land open-end down. Do the outcomes for the spinning penny appear to be equally likely based

	on the observed frequencies?
	8. Find probabilities of compound events using organized lists, tables, tree diagrams, and simulation. a. Understand that, just as with simple events, the probability of a compound event is the fraction of outcomes in the sample space for which the compound event occurs. b. Represent sample spaces for compound events using methods such as organized lists, tables, and tree diagrams. For an event described in everyday language (e.g., "rolling double sixes"), identify the outcomes in the sample space which compose the event. c. Design and use a simulation to generate frequencies for compound events. For example, use random digits as a simulation tool to approximate the answer to the question: If 40% of donors have type A blood, what is the probability that it will take at least four donors to find one with type A blood?
Topic	**7th Grade**
Geometry	
7.G.A . Draw, construct and describe geometrical figures and describe the relationships between them.	1. Solve problems involving scale drawings of geometric figures, such as computing actual lengths and areas from a scale drawing and reproducing a scale drawing at a different scale
	2. Draw (freehand, with ruler and protractor, and with technology) two- dimensional geometric shapes with given conditions. Focus on constructing triangles from three measures of angles or sides, noticing when the conditions determine a unique triangle, more than one triangle, or no triangle.
	3. Describe the shape of the two-dimensional face of the figure that results from slicing three-dimensional figures, as in plane sections of right rectangular prisms and right rectangular pyramids.
7.G.B . Solve real- life and mathematical problems involving angle measure, area, surface area, and volume.	4. Circles and measurement: a. Know that a circle is a two-dimensional shape created by connecting all of the points equidistant from a fixed point called the center of the circle. b. Understand and describe the relationships among the radius, diameter, and circumference of a circle. c. Understand and describe the relationship among the radius, diameter, and area of a circle. d. Know the formulas for the area and circumference of a circle and use them to solve problems. e. Give an informal derivation of the relationship between the circumference and area of a circle.
	5. Use facts about supplementary, complementary, vertical, and adjacent angles in a multi-step problem to write simple equations and use them to solve for an unknown angle in a figure.
	6. Solve real-world and mathematical problems involving area, volume, and surface area of two- and three-dimensional objects composed of triangles, quadrilaterals, polygons, cubes, and right prisms.

MATH STANDARDS - 5-8TH GRADE ALIGNMENT	
Topic	**8th Grade**
Functions	
8.F.A Define, evaluate, and compare functions.	1. Understand that a function is a rule that assigns to each input exactly one output. The graph of a function is the set of ordered pairs consisting of an input and the corresponding output.
	2. Compare properties of two functions each represented in a different way (algebraically, graphically, numerically in tables, or by verbal descriptions). For example, given a linear function represented by a table of values and a linear function represented by an algebraic expression, determine which function has the greater rate of change.
	3. Interpret the equation y = mx + b as defining a linear function whose graph is a straight line; give examples of functions that are not linear. For example, the function A = s2 giving the area of a square as a function of its side length is not linear because its graph contains the points (1, 1), (2, 4) and (3, 9), which are not on a straight line.
8.F.B Use functions to model relationships between quantities.	4. Construct a function to model a linear relationship between two quantities. Determine the rate of change and initial value of the function from a description of a relationship or from two (x, y) values, including reading these from a table or from a graph. Interpret the rate of change and initial value of a linear function in terms of the situation it models, and in terms of its graph or a table of values.
	5. Describe qualitatively the functional relationship between two quantities by analyzing a graph (e.g., where the function is increasing or decreasing, linear or nonlinear). Sketch a graph that exhibits the qualitative features of a function that has been described verbally.
Topic	**8th Grade**
The Number System	

8.NS.A Know that there are numbers that are not rational, and approximate them by rational numbers.	1. Know that numbers that are not rational are called irrational. Understand informally that every number has a decimal expansion. For rational numbers show that the decimal expansion repeats eventually, and convert a decimal expansion which repeats eventually into a rational number.
	2. Use rational approximations of irrational numbers to compare the size of irrational numbers, locate them approximately on a number line diagram, and estimate the value of expressions (e.g., 2). For example, by truncating the decimal expansion of show that is between 1 and 2, then between 1.4 and 1.5, and explain how to continue on to get better approximations.
Topic	**8th Grade**
Expressions and Equations	
8.EE.A Work with radicals and integer exponents.	Work with radicals and integer exponents. 1. Know and apply the properties of integer exponents to generate equivalent numerical expressions.
	2. Use square root and cube root symbols to represent solutions to equations of the form x 2 = p and x 3 = p, where p is a positive rational number. Evaluate square roots of small perfect squares and cube roots of small perfect cubes. Know that is irrational.
	3. Use numbers expressed in the form of a single digit multiplied by an integer power of 10 to estimate very large or very small quantities, and express how many times as much one is than the other. For example, estimate the population of the United States as 3 × 10^8 and the population of the world as 7 × 10^9, and determine that the world population is more than 20 times larger.
	4. Perform operations with numbers expressed in scientific notation, including problems where both decimal and scientific notation are used. Use scientific notation and choose units of appropriate size for measurements of very large or very small quantities (e.g., use millimeters per year for seafloor spreading). Interpret scientific notation that has been generated by technology.
8.EE.B B. Understand the connections between proportional relationships, lines, and linear equations.	5. Graph proportional relationships, interpreting the unit rate as the slope of the graph. Compare two different proportional relationships represented in different ways. For example, compare a distance-time graph to a distance-time equation to determine which of two moving objects has greater speed.
	6. Use similar triangles to explain why the slope m is the same between any two distinct points on a nonvertical line in the coordinate plane. Derive the equation y = mx for a line through the origin and the equation y = mx + b for a line intercepting the vertical axis at b.
8.EE.C. Analyze and solve linear equations and pairs of simultaneous linear equations.	7. Solve linear equations in one variable. a. Give examples of linear equations in one variable with one solution, infinitely many solutions, or no solutions. Show which of these possibilities is the case by successively transforming the given equation into simpler forms, until an equivalent equation of the form x = a, a = a, or a = b results (where a and b are different numbers). b. Solve linear equations with rational number coefficients, including equations whose solutions require expanding expressions using the distributive property and collecting like terms.
	8. Analyze and solve pairs of simultaneous linear equations. a. Understand that solutions to a system of two linear equations in two variables correspond to points of intersection of their graphs, because points of intersection satisfy both equations simultaneously. b. Solve systems of two linear equations in two variables algebraically (using substitution and elimination strategies), and estimate solutions by graphing the equations. Solve simple cases by inspection. For example, 3x + 2y = 5 and 3x + 2y = 6 have no solution because 3x + 2y cannot simultaneously be 5 and 6. c. Solve real-world and mathematical problems leading to two linear equations in two variables. For example, given coordinates for two pairs of points, determine whether the line through the first pair of points intersects the line through the second pair.
Topic	**8th Grade**
Statistics and Probability	
8.SP.A Investigate patterns of association in bivariate data.	1. Construct and interpret scatter plots for bivariate measurement data to investigate patterns of association between two quantities. Describe patterns such as clustering, outliers, positive or negative association, linear association, and nonlinear association
	2. Know that straight lines are widely used to model relationships between two quantitative variables. For scatter plots that suggest a linear association, informally fit a straight line and informally assess the model fit by judging the closeness of the data points to the line.

	3. Use the equation of a linear model to solve problems in the context of bivariate measurement data, interpreting the slope and intercept. For example, in a linear model for a biology experiment, interpret a slope of 1.5 cm/hr as meaning that an additional hour of sunlight each day is associated with an additional 1.5 cm in mature plant height
	4. Understand that patterns of association can also be seen in bivariate categorical data by displaying frequencies and relative frequencies in a two-way table. Construct and interpret a two-way table summarizing data on two categorical variables collected from the same subjects. Use relative frequencies calculated for rows or columns to describe possible association between the two variables. For example, collect data from students in your class on whether or not they have a curfew on school nights and whether or not they have assigned chores at home. Is there evidence that those who have a curfew also tend to have chores?
Topic	**8th Grade**
Geometry	
8.G.A Understand congruence and similarity using physical models, transparencies, or geometry software.	1. Verify experimentally the properties of rotations, reflections, and translations: a. Lines are transformed to lines, and line segments to line segments of the same length. b. Angles are transformed to angles of the same measure. c. Parallel lines are transformed to parallel lines.
	2. Understand that a two-dimensional figure is congruent to another if the second can be obtained from the first by a sequence of rotations, reflections, and translations. Given two congruent figures, describe a sequence that exhibits the congruence between them.
	3. Describe the effects of dilations, translations, rotations, and reflections on two-dimensional figures using coordinates.
	4. Understand that a two-dimensional figure is similar to another if the second can be obtained from the first by a sequence of rotations, reflections, translations, and dilations. Given two similar two dimensional figures, describe a sequence that exhibits the similarity between them.
	5. Use informal arguments to establish facts about the angle sum and exterior angle of triangles, about the angles created when parallel lines are cut by a transversal, and the angle-angle criterion for similarity of triangles. For example, arrange three copies of the same triangle so that the sum of the three angles appears to form a line, and give an argument in terms of transversals why this is so.
8.G.B Understand and apply the Pythagorean Theorem.	6. a. Understand the relationship among the sides of a right triangle. b. Analyze and justify the Pythagorean Theorem and its converse using pictures, diagrams, narratives, or models.
	7. Apply the Pythagorean Theorem to determine unknown side lengths in right triangles in real-world and mathematical problems in two and three dimensions.
	8. Apply the Pythagorean Theorem to find the distance between two points in a coordinate system.
8.G.C Solve real- world and mathematical problems involving volume of cylinders, cones, and spheres.	9. Know the formulas for the volumes of cones, cylinders, and spheres, and use them to solve real-world and mathematical problems.

SOCIAL STUDIES STANDARDS - 5-8TH GRADE ALIGNMENT	
Standard/ Definition	***5th Grade***
Informational Reading Standards	**Informational Reading Standards**
Key Ideas and Details	1. Quote or paraphrase a text accurately when explaining what the text says explicitly and when drawing inferences from the text.
	2. Determine one or more main ideas of a text and explain how they are supported by key details; summarize a text.
	3 Explain the relationships or interactions between two or more individuals, events, ideas, or concepts in a historical, scientific,
Craft and Structure	4 Determine the meaning of general and domain-specific words and phrases in a text relevant to a grade 5 topic or subject area.
	5 Describe how an author uses one or more structures (e.g., chronology, comparison, cause/effect, problem/solution) of events, to present information in a text
	6 Analyze multiple accounts of the same event or topic, noting important similarities and differences in the points of view they represent.

Integration of Knowledge and Ideas	7 Draw on information from multiple print or digital sources, demonstrating the ability to locate an answer to a question quickly or to solve a problem efficiently.
	8 Explain how an author uses reasons and evidence to support particular points in a text, identifying which reasons and evidence support which point(s).
Range of Reading and Level of Text Complexity	9 Integrate information from several texts on the same topic in order to write or speak knowledgeably about the subject.
	10 Independently and proficiently read and comprehend informational texts, including history/social studies, science, mathematical, and technical texts, exhibiting complexity appropriate for at least grade 5.
Writing Standards	**Writing Standards**
Text Types and Purposes: Write opinion pieces on topics or texts, supporting a point of view with reasons and information.	1. a Introduce a topic or text clearly, state an opinion, and create an organizational structure in which ideas are logically grouped in paragraphs and sections to support the writer's purpose.
	1.b Provide logically ordered reasons that are supported by facts and details.
	1. c Link opinion and reasons using words, phrases, and clauses (e.g., consequently, specifically).
	1. d Provide a concluding statement or section related to the opinion presented.
Text types: Write informative/explanatory texts to examine a topic and convey ideas and information clearly.	2. a Introduce a topic clearly, provide a general observation and focus, and group related information logically in paragraphs and sections; include text features (e.g., headings), illustrations, and multimedia when useful to aiding comprehension.
	2. b Develop the topic with facts, definitions, concrete details, quotations, or other information and examples related to the topic.
	2. c Link ideas within and across categories of information using words, phrases, and clauses (e.g., in contrast, especially).
	2.d. Use precise language and domain-specific vocabulary to inform about or explain the topic.
	2 e. Provide a concluding statement or section related to the information or explanation presented.
Text types: Write narratives in prose or poem form to develop experiences or events using effective literary techniques, descriptive details, and clear sequences.	3. a Orient the reader by establishing a situation and introducing a speaker, narrator, and/or characters; organize an appropriate narrative sequence.
	3.b. Use narrative techniques such as dialogue, description, and pacing to develop experiences or events or show responses to situations.
	3.c Use a variety of transitional words, phrases, and clauses to manage sequence.
	3. d Use concrete words and phrases and sensory details to convey experiences and events precisely.
	3. e Provide a sense of closure appropriate to the narrated experiences or events.
	3. f For prose narratives, draw on characteristics of traditional or modern genres (e.g., tall tales, myths, mysteries, fantasies, historical fiction) from diverse cultures as models for writing.
	3.g For poems, draw on characteristics of traditional poetic forms (e. g., ballads, couplets) or modern free verse from diverse cultures as models for writing.
Production and Distribution of Writing	4. Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience.
	5. Develop and strengthen writing as needed by planning, revising, and editing.
	6. Use technology, including current web-based communication platforms, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of two pages in a single sitting.
Research to Build and Present Knowledge	7. Conduct short research projects that use several sources to build knowledge through investigation of different aspects of a topic.
	8. Recall relevant information from experiences or gather relevant information from print and digital sources; summarize or paraphrase information in notes and finished work, and provide a list of sources.
Range of Writing	9. Draw evidence from literary or informational texts to support written analysis, reflection, and research.

	10. Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.
Speaking and Listening Standards	**Speaking and Listening Standards**
Comprehension and Collaboration	Engage effectively in a range of collaborative discussions (one-on- one, in groups, and teacher-led) with diverse partners on grade 5 topics and texts, building on others' ideas and expressing their own clearly.
	1.a. Come to discussions prepared, having read or studied required material; explicitly draw on that preparation and other information known about the topic to explore ideas under discussion.
	1. b Follow agreed-upon rules for discussions and carry out assigned roles.
	1. cPose and respond to specific questions by making comments that contribute to the discussion and elaborate on the remarks of others.
	1 dReview the key ideas expressed and draw conclusions in light of information and knowledge gained from the discussions.
	2. Summarize a written text read aloud or information presented in diverse media and formats, including visually, quantitatively, and orally.
	3. Summarize the points a speaker makes and explain how each claim is supported by reasons and evidence.
Presentation of Knowledge and Ideas	4. Report on a topic, text, procedure, or solution to a mathematical problem, or present an opinion, sequencing ideas logically and using appropriate facts and relevant, descriptive details to support main ideas or themes; speak clearly at an understandable pace and use appropriate vocabulary.
	5. Include multimedia components and visual displays in presentations when appropriate to enhance the development of main ideas or themes.
	6. Adapt speech to a variety of contexts and tasks, using formal English when appropriate for task and situation.

SOCIAL STUDIES STANDARDS - 5-8TH GRADE ALIGNMENT			
Standard/ Definition	**6th Grade**	**7th Grade**	**8th Grade**
1. Sourcing			
Consider the origins and context of a source to make meaning of it.	1.1 Evaluate a historical source for point of view and historical context	1.1 Evaluate a historical source for point of view and historical context	1.1 Evaluate a historical source for point of view and historical context
	1.2 Identify source biases	1.2 Identify source biases	1.2 Identify source biases
2. Continuity and Change			
The key concepts of continuity and change, cause and effect, complexity, unity and diversity over time	2.1 Compare/contrast lives and conditions between groups of people	2.1 Compare/contrast lives and conditions between groups of people	2.1 Compare/contrast lives and conditions between groups of people
3. Making Historical Connections / Context			
The significance of ideas as powerful forces throughout history; making connections between historical eras and circumstances and particular events and accounts	3.1 Interpret historical evidence to make an inference about daily life	3.1 Interpret historical evidence to make an inference about daily life	3.1 Interpret historical evidence to make an inference about daily life
	3.2 Make a connection between a historical event and the modern day.	3.2 Make a connection between a historical event and the modern day.	3.2 Make a connection between a historical event and the modern day.
	3.3 Use historical evidence to identify elements /characteristics of a civilization	3.3 Use historical evidence to identify elements /characteristics of a civilization	3.3 Use historical evidence to identify elements /characteristics of a civilization
	3.4 Use sources to examine historical perspectives.	3.4 Use sources to examine historical perspectives.	3.4 Use sources to examine historical perspectives.
	3.5 Question historical perspectives	3.5 Question historical perspectives	3.5 Question historical perspectives

4. Chronological Reasoning			
Beginning with sequencing, students develop an understanding of historical causation and understand the immediate and long term effect of historical events and decisions	4.1 Describe the cause of a historical event	4.1 Describe the cause of a historical event	4.1 Describe the cause of a historical event
	4.2 Describe the effects of a historical event	4.2 Describe the effects of a historical event	4.2 Describe the effects of a historical event
	4.3 Estimate the time period a primary source is from.	4.3 Estimate the time period a primary source is from.	4.3 Estimate the time period a primary source is from.
	4.4 Order historical events based on cause and effect.	4.4 Order historical events based on cause and effect.	4.4 Order historical events based on cause and effect.
5. Human Environment Interaction			
The study of people, places, and environments enables us to understand the relationship between human populations and the physical world	5.1 Describe the role of geographic luck on the strength of a civilization	5.1 Describe the role of geographic luck on the strength of a civilization	5.1 Describe the role of geographic luck on the strength of a civilization
	5.2 Describe the impact of the natural environment on daily life.	5.2 Describe the impact of the natural environment on daily life.	5.2 Describe the impact of the natural environment on daily life.
	5.3 Describe how humans have influenced the environment around them to achieve a goal.	5.3 Describe how humans have influenced the environment around them to achieve a goal.	5.3 Describe how humans have influenced the environment around them to achieve a goal.
	5.4 Identify the influence of relative location on a civilization.	5.4 Identify the influence of relative location on a civilization.	5.4 Identify the influence of relative location on a civilization.
	5.5 Identify how the natural environment can be a motivator for invasions (for resources or trade routes)	5.5 Identify how the natural environment can be a motivator for invasions (for resources or trade routes)	5.5 Identify how the natural environment can be a motivator for invasions (for resources or trade routes)
6. Power, Authority, and Governance			
People create, interact with, and change structures of power, authority, and governance.	6.1 Explain why people develop and create new forms of government	6.1 Explain why people develop and create new forms of government	6.1 Explain why people develop and create new forms of government
	6.2 Describe the influence of structures in society (ex. Religion, Social Class)	6.2 Describe the influence of structures in society (ex. Religion, Social Class)	6.2 Describe the influence of structures in society (ex. Religion, Social Class)
	6.3 Identify the ways leaders maintain government stability.	6.3 Identify the ways leaders maintain government stability.	6.3 Identify the ways leaders maintain government stability.
	6.4 Describe the values of a group or individual and how they showed that value.	6.4 Describe the values of a group or individual and how they showed that value.	6.4 Describe the values of a group or individual and how they showed that value.
	6.5 Identify the various types of government and their benefits and drawbacks	6.5 Identify the various types of government and their benefits and drawbacks	6.5 Identify the various types of government and their benefits and drawbacks
	6.6 Identify how different governments function and respond to changes in values	6.6 Identify how different governments function and respond to changes in values	6.6 Identify how different governments function and respond to changes in values
7. Creating and Supporting Historical Argument			
A process by which students question the past and using reasoning to make meaning about the past	7.1 Create an argument based on sources and support it with evidence.	7.1 Create an argument based on sources and support it with evidence.	7.1 Create an argument based on sources and support it with evidence.
8. Participatory Citizenship			

An understanding of civic ideals and practices is critical to full participation in society and is an essential component of education for citizenship, which is the central purpose of social studies.	8.1 Identify how US foundational documents affect the lives of citizens	8.1 Identify how US foundational documents affect the lives of citizens	8.1 Identify how US foundational documents affect the lives of citizens
9. Examining and Analyzing Secondary Sources			
An ability to analyze and extract meaning from a variety of different secondary sources is crucial to student's long term success in Social Studies. In assessments, this often means pulling relevant details from a complex secondary source.	9.1 Identify pertinent details in a text based on a question.	9.1 Identify pertinent details in a text based on a question.	9.1 Identify pertinent details in a text based on a question.
	9.2 Describe the main ideas in a passage	9.2 Describe the main ideas in a passage	9.2 Describe the main ideas in a passage
	9.3 Make an inference based on a map or image.	9.3 Make an inference based on a map or image.	9.3 Make an inference based on a map or image.
	9.4 Identify facts, opinions and reasoned judgments in primary or secondary sources.	9.4 Identify facts, opinions and reasoned judgments in primary or secondary sources.	

	SCIENCE, TECHNOLOGY, AND ENGINEERING STANDARDS - 5-8TH GRADE ALIGNMENT
Anchor Standard	***3rd Grade***
Physical Science	**Physical Science**
PS2. Motion and Stability: Forces and Interactions	3-PS2-1. Provide evidence to explain the effect of multiple forces, including friction, on an object. Include balanced forces that do not change the motion of the object and unbalanced forces that do change the motion of the object.
	3-PS2-3. Conduct an investigation to determine the nature of the forces between two magnets based on their orientations and distance relative to each other.
	3-PS2-4. Define a simple design problem that can be solved by using interactions between magnets.*
Life Science	**Life Science**
LS1. From Molecules to Organisms: Structures and Processes	3-LS1-1. Use simple graphical representations to show that different types of organisms have unique and diverse life cycles. Describe that all organisms have birth, growth, reproduction, and death in common but there are a variety of ways in which these happen.
LS3. Heredity: Inheritance and Variation of Traits	3-LS3-1. Provide evidence, including through the analysis of data, that plants and animals have traits inherited from parents and that variation of these traits exist in a group of similar organisms.
	3-LS3-2. Distinguish between inherited characteristics and those characteristics that result from a direct interaction with the environment. Give examples of characteristics of living organisms that are influenced by both inheritance and the environment.
LS4. Biological Evolution: Unity and Diversity	3-LS4-1. Use fossils to describe types of organisms and their environments that existed long ago and compare those to living organisms and their environments. Recognize that most kinds of plants and animals that once lived on Earth are no longer found anywhere.
	3-LS4-2. Use evidence to construct an explanation for how the variations in characteristics among individuals within the same species may provide advantages to these individuals in their survival and reproduction.
	3-LS4-3. Construct an argument with evidence that in a particular environment some organisms can survive well, some survive less well, and some cannot survive.
	3-LS4-4. Analyze and interpret given data about changes in a habitat and describe how the changes may affect the ability of organisms that live in that habitat to survive and reproduce.
	3-LS4-5(MA). Provide evidence to support a claim that the survival of a population is dependent upon reproduction.
Earth and Space	**Earth and Space Science**
ESS2. Earth's Systems	3-ESS2-1. Use graphs and tables of local weather data to describe and predict typical weather during a particular season in an area.
	3-ESS2-2. Obtain and summarize information about the climate of different regions of the world to illustrate that typical weather conditions over a year vary by region.
ESS3. Earth and Human Activity	3-ESS3-1. Evaluate the merit of a design solution that reduces the damage caused by weather.
Eng., Tech., & App.	**Engineering, Technology, and Application of Science**

ETS1. Engineering Design	3.3-5-ETS1-1. Define a simple design problem that reflects a need or a want. Include criteria for success and constraints on materials, time, or cost that a potential solution must meet.*
	3.3-5-ETS1-2. Generate several possible solutions to a given design problem. Compare each solution based on how well each is likely to meet the criteria and constraints of the design problem.*
	3.3-5-ETS1-4(MA). Gather information using various informational resources on possible solutions to a design problem. Present different representations of a design solution.*

SCIENCE, TECHNOLOGY, AND ENGINEERING STANDARDS - 5-8TH GRADE ALIGNMENT	
Anchor Standard	***4th Grade***
Physical Science	**Physical Science**
PS3. Energy	4-PS3-1. Use evidence to construct an explanation relating the speed of an object to the energy of that object.
	4-PS3-2. Make observations to show that energy can be transferred from place to place by sound, light, heat, and electric currents.
	4-PS3-3. Ask questions and predict outcomes about the changes in energy that occur when objects collide.
	4-PS3-4. Apply scientific principles of energy and motion to test and refine a device that converts kinetic energy to electrical energy or uses stored energy to cause motion or produce light or sound.*
PS4. Waves and Their Applications in Technologies for Information Transfer	4-PS4-1. Develop a model of a simple mechanical wave (including sound) to communicate that waves (a) are regular patterns of motion along which energy travels and (b) can cause objects to move.
	4-PS4-2. Develop a model to describe that light must reflect off an object and enter the eye for the object to be seen.
	4-PS4-3. Develop and compare multiple ways to transfer information through encoding, sending, receiving, and decoding a pattern.*
Life Science	**Life Science**
LS1. From Molecules to Organisms: Structures and Processes	4-LS1-1. Construct an argument that animals and plants have internal and external structures that support their survival, growth, behavior, and reproduction.
Earth and Space	**Earth and Space Science**
ESS1. Earth's Place in the Universe	4-ESS1-1. Use evidence from a given landscape that includes simple landforms and rock layers to support a claim about the role of erosion or deposition in the formation of the landscape over long periods of time.
ESS2. Earth's Systems	4-ESS2-1. Make observations and collect data to provide evidence that rocks, soils, and sediments are broken into smaller pieces through mechanical weathering and moved around through erosion.
	4-ESS2-2. Analyze and interpret maps of Earth's mountain ranges, deep ocean trenches, volcanoes, and earthquake epicenters to describe patterns of these features and their locations relative to boundaries between continents and oceans.
ESS3. Earth and Human Activity	4-ESS3-1. Obtain information to describe that energy and fuels humans use are derived from natural resources and that some energy and fuel sources are renewable and some are not.
	4-ESS3-2. Evaluate different solutions to reduce the impacts of a natural event such as an earthquake, blizzard, or flood on humans.*
Eng., Tech., & App.	**Engineering, Technology, and Application of Science**
ETS1. Engineering Design	4.3-5-ETS1-3. Plan and carry out tests of one or more design features of a given model or prototype in which variables are controlled and failure points are considered to identify which features need to be improved. Apply the results of tests to redesign a model or prototype.*
	4.3-5-ETS1-5(MA). Evaluate relevant design features that must be considered in building a model or prototype of a solution to a given design problem.*

SCIENCE, TECHNOLOGY, AND ENGINEERING STANDARDS - 5-8TH GRADE ALIGNMENT	
Anchor Standard	***5th Grade***
Physical Science	**Physical Science**
PS1. Matter and Its Interactions	5-PS1-1. Use a particle model of matter to explain common phenomena involving gases, and phase changes between gas and liquid and between liquid and solid.
	5-PS1-2. Measure and graph the weights (masses) of substances before and after a reaction or phase change to provide evidence that regardless of the type of change that occurs when heating, cooling, or combining substances, the total weight (mass) of matter is conserved.

	5-PS1-3. Make observations and measurements of substances to describe characteristic properties of each, including color, hardness, reflectivity, electrical conductivity, thermal conductivity, response to magnetic forces, and solubility.
	5-PS1-4. Conduct an experiment to determine whether the mixing of two or more substances results in new substances with new properties (a chemical reaction) or not (a mixture).
PS2. Motion and Stability: Forces and Interactions	5-PS2-1. Support an argument with evidence that the gravitational force exerted by Earth on objects is directed toward Earth's center.
PS3. Energy	5-PS3-1. Use a model to describe that the food animals digest (a) contains energy that was once energy from the Sun, and (b) provides energy and nutrients for life processes, including body repair, growth, motion, body warmth, and reproduction.
Life Science	**Life Science**
LS1. From Molecules to Organisms: Structures and Processes	5-LS1-1. Ask testable questions about the process by which plants use air, water, and energy from sunlight to produce sugars and plant materials needed for growth and reproduction.
LS2. Ecosystems: Interactions, Energy, and Dynamics	5-LS2-1. Develop a model to describe the movement of matter among producers, consumers, decomposers, and the air, water, and soil in the environment to (a) show that plants produce sugars and plant materials, (b) show that animals can eat plants and/or other animals for food, and (c) show that some organisms, including fungi and bacteria, break down dead organisms and recycle some materials back to the air and soil.
	5-LS2-2(MA). Compare at least two designs for a composter to determine which is most likely to encourage decomposition of materials.
Earth and Space	**Earth and Space Science**
ESS1. Earth's Place in the Universe	5-ESS1-1. Use observations, first-hand and from various media, to argue that the Sun is a star that appears larger and brighter than other stars because it is closer to Earth.
	5-ESS1-2. Use a model to communicate Earth's relationship to the Sun, Moon, and other stars that explain (a) why people on Earth experience day and night, (b) patterns in daily changes in length and direction of shadows over a day, and (c) changes in the apparent position of the Sun, Moon, and stars at different times during a day, over a month, and over a year.
ESS2. Earth's Systems	5-ESS2-1. Use a model to describe the cycling of water through a watershed through evaporation, precipitation, absorption, surface runoff, and condensation.
	5-ESS2-2. Describe and graph the relative amounts of salt water in the ocean; fresh water in lakes, rivers, and groundwater; and fresh water frozen in glaciers and polar ice caps to provide evidence about the availability of fresh water in Earth's biosphere.
ESS3. Earth and Human Activity	5-ESS3-1. Obtain and combine information about ways communities reduce human impact on the Earth's resources and environment by changing an agricultural, industrial, or community practice or process.
	5-ESS3-2(MA). Test a simple system designed to filter particulates out of water and propose one change to the design to improve it
Eng., Tech., & App.	**Engineering, Technology, and Application of Science**
ETS3. Technological Systems	5.3-5-ETS3-1(MA). Use informational text to provide examples of improvements to existing technologies (innovations) and the development of new technologies (inventions). Recognize that technology is any modification of the natural or designed world done to fulfill human needs or wants.
	5.3-5-ETS3-2(MA). Use sketches or drawings to show how each part of a product or device relates to other parts in the product or device.

SCIENCE, TECHNOLOGY, AND ENGINEERING STANDARDS - 5-8TH GRADE ALIGNMENT	
Anchor Standard	**6th Grade**
Physical Science	**Physical Science**
PS1. Matter and Its Interactions	6.MS-PS1-6. Plan and conduct an experiment involving exothermic and endothermic chemical reactions to measure and describe the release or absorption of thermal energy.
	6.MS-PS1-7(MA). Use a particulate model of matter to explain that density is the amount of matter (mass) in a given volume. Apply proportional reasoning to describe, calculate, and compare relative densities of different materials.

	6.MS-PS1-8(MA). Conduct an experiment to show that many materials are mixtures of pure substances that can be separated by physical means into their component pure substances.
PS2. Motion and Stability: Forces and Interactions	6.MS-PS2-4. Use evidence to support the claim that gravitational forces between objects are attractive and are only noticeable when one or both of the objects have a very large mass.
PS4. Waves and Their Applications in Technologies for Information Transfer	6.MS-PS4-1. Use diagrams of a simple wave to explain that (a) a wave has a repeating pattern with a specific amplitude, frequency, and wavelength, and (b) the amplitude of a wave is related to the energy of the wave.
	6.MS-PS4-2. Use diagrams and other models to show that both light rays and mechanical waves are reflected, absorbed, or transmitted through various materials.
	6.MS-PS4-3. Present qualitative scientific and technical information to support the claim that digitized signals (sent as wave pulses representing 0s and 1s) can be used to encode and transmit information.
Life Science	**Life Science**
LS1. From Molecules to Organisms: Structures and Processes	6.MS-LS1-1. Provide evidence that all organisms (unicellular and multicellular) are made of cells.
	6.MS-LS1-2. Develop and use a model to describe how parts of cells contribute to the cellular functions of obtaining food, water, and other nutrients from its environment, disposing of wastes, and providing energy for cellular processes.
	6.MS-LS1-3. Construct an argument supported by evidence that the body systems interact to carry out essential functions of life.
LS4. Biological Evolution: Unity and Diversity	6.MS-LS4-1. Analyze and interpret evidence from the fossil record to describe organisms and their environment, extinctions, and changes to life forms throughout the history of Earth.
	6.MS-LS4-2. Construct an argument using anatomical structures to support evolutionary relationships among and between fossil organisms and modern organisms.
Earth and Space	**Earth and Space Science**
ESS1. Earth's Place in the Universe	6.MS-ESS1-1a. Develop and use a model of the Earth-Sun-Moon system to explain the causes of lunar phases and eclipses of the Sun and Moon.
	6.MS-ESS1-4. Analyze and interpret rock layers and index fossils to determine the relative ages of rock formations that result from processes occurring over long periods of time.
	6.MS-ESS1-5(MA). Use graphical displays to illustrate that Earth and its solar system are one of many in the Milky Way galaxy, which is one of billions of galaxies in the universe.
ESS2. Earth's Systems	6.MS-ESS2-3. Analyze and interpret maps showing the distribution of fossils and rocks, continental shapes, and seafloor structures to provide evidence that Earth's plates have moved great distances, collided, and spread apart.
Eng., Tech., & App.	**Engineering, Technology, and Application of Science**
ETS1. Engineering Design	6.MS-ETS1-1. Define the criteria and constraints of a design problem with sufficient precision to ensure a successful solution. Include potential impacts on people and the natural environment that may limit possible solutions.
	6.MS-ETS1-5(MA). Create visual representations of solutions to a design problem. Accurately interpret and apply scale and proportion to visual representations.
	6.MS-ETS1-6(MA). Communicate a design solution to an intended user, including design features and limitations of the solution.
ETS2. Materials, Tools, and Manufacturing	6.MS-ETS2-1(MA). Analyze and compare properties of metals, plastics, wood, and ceramics, including flexibility, ductility, hardness, thermal conductivity, electrical conductivity, and melting point.
	6.MS-ETS2-2(MA). Given a design task, select appropriate materials based on specific properties needed in the construction of a solution.
	6.MS-ETS2-3(MA). Choose and safely use appropriate measuring tools, hand tools, fasteners, and common hand-held power tools used to construct a prototype.

SCIENCE, TECHNOLOGY, AND ENGINEERING STANDARDS - 5-8TH GRADE ALIGNMENT	
Anchor Standard	**7th Grade**
Physical Science	**Physical Science**
PS2. Motion and Stability: Forces and Interactions	7.MS-PS2-3. Analyze data to describe the effect of distance and magnitude of electric charge on the strength of electric forces.
	7.MS-PS2-5. Use scientific evidence to argue that fields exist between objects with mass, between magnetic objects, and between electrically charged objects that exert force on each other even though the objects are not in contact.

PS3. Energy	7.MS-PS3-1. Construct and interpret data and graphs to describe the relationships among kinetic energy, mass, and speed of an object.
	7.MS-PS3-2. Develop a model to describe the relationship between the relative positions of objects interacting at a distance and their relative potential energy in the system.
	7.MS-PS3-3. Apply scientific principles of energy and heat transfer to design, construct, and test a device to minimize or maximize thermal energy transfer.
	7.MS-PS3-4. Conduct an investigation to determine the relationships among the energy transferred, how well the type of matter retains or radiates heat, the mass, and the change in the average kinetic energy of the particles as measured by the temperature of the sample.
	7.MS-PS3-5. Present evidence to support the claim that when the kinetic energy of an object changes, energy is transferred to or from the object.
	7.MS-PS3-6(MA). Use a model to explain how thermal energy is transferred out of hotter regions or objects and into colder ones by convection, conduction, and radiation.
	7.MS-PS3-7(MA). Use informational text to describe the relationship between kinetic and potential energy and illustrate conversions from one form to another.
Life Science	**Life Science**
LS1. From Molecules to Organisms: Structures and Processes	7.MS-LS1-4. Construct an explanation based on evidence for how characteristic animal behaviors and specialized plant structures increase the probability of successful reproduction of animals and plants.
LS2. Ecosystems: Interactions, Energy, and Dynamics	7.MS-LS2-1. Analyze and interpret data to provide evidence for the effects of periods of abundant and scarce resources on the growth of organisms and the size of populations in an ecosystem.
	7.MS-LS2-2. Describe how relationships among and between organisms in an ecosystem can be competitive, predatory, parasitic, and mutually beneficial and that these interactions are found across multiple ecosystems.
	7.MS-LS2-3. Develop a model to describe that matter and energy are transferred among living and nonliving parts of an ecosystem and that both matter and energy are conserved through these processes.
	7.MS-LS2-4. Analyze data to provide evidence that disruptions (natural or human-made) to any physical or biological component of an ecosystem can lead to shifts in all its populations.
	7.MS-LS2-5. Evaluate competing design solutions for protecting an ecosystem. Discuss benefits and limitations of each design.
	7.MS-LS2-6(MA). Explain how changes to the biodiversity of an ecosystem—the variety of species found in the ecosystem—may limit the availability of resources humans use.
Earth and Space	**Earth and Space Science**
ESS2. Earth's Systems	7.MS-ESS2-2. Construct an explanation based on evidence for how Earth's surface has changed over scales that range from local to global in size.
	7.MS-ESS2-4. Develop a model to explain how the energy of the Sun and Earth's gravity drive the cycling of water, including changes of state, as it moves through multiple pathways in Earth's hydrosphere.
ESS3. Earth and Human Activity	7.MS-ESS3-2. Obtain and communicate information on how data from past geologic events are analyzed for patterns and used to forecast the location and likelihood of future catastrophic events.
	7.MS-ESS3-4. Construct an argument supported by evidence that human activities and technologies can mitigate the impact of increases in human population and per capita consumption of natural resources on the environment.
Eng., Tech., & App.	**Engineering, Technology, and Application of Science**
ETS1. Engineering Design	7.MS-ETS1-2. Evaluate competing solutions to a given design problem using a decision matrix to determine how well each meets the criteria and constraints of the problem. Use a model of each solution to evaluate how variations in one or more design features, including size, shape, weight, or cost, may affect the function or effectiveness of the solution.
	7.MS-ETS1-4. Generate and analyze data from iterative testing and modification of a proposed object, tool, or process to optimize the object, tool, or process for its intended purpose.
	7.MS-ETS1-7(MA). Construct a prototype of a solution to a given design problem.
ETS3. Technological Systems	7.MS-ETS3-1(MA). Explain the function of a communication system and the role of its components, including a source, encoder, transmitter, receiver, decoder, and storage.
	7.MS-ETS3-2(MA). Compare the benefits and drawbacks of different communication systems.
	7.MS-ETS3-3(MA). Research and communicate information about how transportation systems are designed to

	move people and goods using a variety of vehicles and devices. Identify and describe subsystems of a transportation vehicle, including structural, propulsion, guidance, suspension, and control subsystems.
	7.MS-ETS3-4(MA). Show how the components of a structural system work together to serve a structural function. Provide examples of physical structures and relate their design to their intended use.
	7.MS-ETS3-5(MA). Use the concept of systems engineering to model inputs, processes, outputs, and feedback among components of a transportation, structural, or communication system.

SCIENCE, TECHNOLOGY, AND ENGINEERING STANDARDS - 5-8TH GRADE ALIGNMENT	
Anchor Standard	**8th Grade**
Physical Science	**Physical Science**
PS1. Matter and Its Interactions	8.MS-PS1-1. Develop a model to describe that (a) atoms combine in a multitude of ways to produce pure substances which make up all of the living and nonliving things that we encounter, (b) atoms form molecules and compounds that range in size from two to thousands of atoms, and (c) mixtures are composed of different proportions of pure substances.
	8.MS-PS1-2. Analyze and interpret data on the properties of substances before and after the substances interact to determine if a chemical reaction has occurred.
	8.MS-PS1-4. Develop a model that describes and predicts changes in particle motion, relative spatial arrangement, temperature, and state of a pure substance when thermal energy is added or removed.
	8.MS-PS1-5. Use a model to explain that atoms are rearranged during a chemical reaction to form new substances with new properties. Explain that the atoms present in the reactants are all present in the products and thus the total number of atoms is conserved.
PS2. Motion and Stability: Forces and Interactions	8.MS-PS2-1. Develop a model that demonstrates Newton's third law involving the motion of two colliding objects.
	8.MS-PS2-2. Provide evidence that the change in an object's speed depends on the sum of the forces on the object (the net force) and the mass of the object.
Life Science	**Life Science**
LS1. From Molecules to Organisms: Structures and Processes	8.MS-LS1-5. Construct an argument based on evidence for how environmental and genetic factors influence the growth of organisms.
	8.MS-LS1-7. Use informational text to describe that food molecules, including carbohydrates, proteins, and fats, are broken down and rearranged through chemical reactions forming new molecules that support cell growth and/or release of energy.
LS3. Heredity: Inheritance and Variation of Traits	8.MS-LS3-1. Develop and use a model to describe that structural changes to genes (mutations) may or may not result in changes to proteins, and if there are changes to proteins there may be harmful, beneficial, or neutral changes to traits.
	8.MS-LS3-2. Construct an argument based on evidence for how asexual reproduction results in offspring with identical genetic information and sexual reproduction results in offspring with genetic variation. Compare and contrast advantages and disadvantages of asexual and sexual reproduction.
	8.MS-LS3-3(MA). Communicate through writing and in diagrams that chromosomes contain many distinct genes and that each gene holds the instructions for the production of specific proteins, which in turn affects the traits of an individual.
	8.MS-LS3-4(MA). Develop and use a model to show that sexually reproducing organisms have two of each chromosome in their cell nuclei, and hence two variants (alleles) of each gene that can be the same or different from each other, with one random assortment of each chromosome passed down to offspring from both parents.
LS4. Biological Evolution: Unity and Diversity	8.MS-LS4-4. Use a model to describe the process of natural selection, in which genetic variations of some traits in a population increase some individuals' likelihood of surviving and reproducing in a changing environment. Provide evidence that natural selection occurs over many generations.
	8.MS-LS4-5. Synthesize and communicate information about artificial selection, or the ways in which humans have changed the inheritance of desired traits in organisms.
Earth and Space	**Earth and Space Science**
ESS1. Earth's Place in the Universe	8.MS-ESS1-1b. Develop and use a model of the Earth-Sun system to explain the cyclical pattern of seasons, which includes Earth's tilt and differential intensity of sunlight on different areas of Earth across the year.
	8.MS-ESS1-2. Explain the role of gravity in ocean tides, the orbital motions of planets, their moons, and asteroids in the solar system.

ESS2. Earth's Systems	8.MS-ESS2-1. Use a model to illustrate that energy from Earth's interior drives convection that cycles Earth's crust, leading to melting, crystallization, weathering, and deformation of large rock formations, including generation of ocean sea floor at ridges, submergence of ocean sea floor at trenches, mountain building, and active volcanic chains.
	8.MS-ESS2-5. Interpret basic weather data to identify patterns in air mass interactions and the relationship of those patterns to local weather.
	8.MS-ESS2-6. Describe how interactions involving the ocean affect weather and climate on a regional scale, including the influence of the ocean temperature as mediated by energy input from the Sun and energy loss due to evaporation or redistribution via ocean currents.
ESS3. Earth and Human Activity	8.MS-ESS3-1. Analyze and interpret data to explain that the Earth's mineral and fossil fuel resources are unevenly distributed as a result of geologic processes.
	8.MS-ESS3-5. Examine and interpret data to describe the role that human activities have played in causing the rise in global temperatures over the past century.
Eng., Tech., & App.	**Engineering, Technology, and Application of Science**
ETS2. Materials, Tools, and Manufacturing	8.MS-ETS2-4(MA). Use informational text to illustrate that materials maintain their composition under various kinds of physical processing; however, some material properties may change if a process changes the particulate structure of a material.
	8.MS-ETS2-5(MA). Present information that illustrates how a product can be created using basic processes in manufacturing systems, including forming, separating, conditioning, assembling, finishing, quality control, and safety. Compare the advantages and disadvantages of human vs. computer control of these processes.

Excel Academy Charter High School

Academic Course Overview

English Department

English Foundations

Grades: 9

English Foundations is a course that prepares students for high-school-level English. Our year-long project is for students to master basic skills and habits to be better readers, writers, listeners, and speakers. We will do this through a variety of literary genres—short story, novel, poetry, drama, and non-fiction – as well as using different types of writing for a variety of purposes. We will explore these through quarterly "themes".

English Skills

Grade(s): 10, 11

The focus of this course is to improve critical thinking and inference-making skills through targeted instruction and remediation in the domains of reading, writing, and discussion. Students will increase their reading fluency, decoding abilities, fund of vocabulary, and overall comprehension of what they read. They will complement these reading skills with explicit instruction in how to organize their writing syntactically and semantically at the sentence, paragraph, and multi-paragraph levels. Students will push their comprehension and critical thought even deeper through structured and routine discussions with each other.

ELD 1

Grade(s): 9, 10, 11, 12

ELD 1 supports emerging bilingual students (MLLs) as they acquire the fundamental language and literacy skills for high school success. Students will read, write, and discuss text daily, with particular emphasis placed on academic language development.

ELD 2.

Grade(s): 9, 10, 11, 12

ELD 2 supports emerging bilingual students' (MLLs) acquisition of academic English, background knowledge, and literacy skills. Students read, write, and discuss text daily, with an emphasis on oral and written language development, as well as executive functioning and habits of mind. Course texts are chosen for rigor, relevance, and diversity of voice and text-type. Literary works in each unit will be supplemented with relevant informational text to build background knowledge and reinforce grade-level standards. In addition, students will engage in a series of related project-based learning experiences to further develop academic language and content knowledge.

ELD 3

Grade(s): 9, 10, 11, 12

ELD 3 supports MLL students as they develop the academic language and literacy skills for success in grade level content courses, including English, the following year.

English I

Grades: 9, 10

9th grade represents a critical time in the development of students' identities as readers, as writers, and as humans. One of the foundational ways in which humans have always investigated what it means to be human is storytelling. With that in mind, English 9 is a course about stories. Through our study of complex, varied texts, we will learn what it means to tell stories: stories that help, stories that harm, stories that comfort, and stories that portray who we are. We'll investigate the power that storytelling in all its forms has as we read novels, poems, and informational text while writing stories of their own alongside them.

English II

Grades: 10, 11

Grade 10 English is a course about the ways in which ways morality are at play in our lives and are represented in literature. We will read widely to explore such questions as: What is morality? How is morality created? How does morality function in our own lives? What role does it play? Is morality personal or is it objective? What does it mean to be morally good or bad? How do authors use literature to reveal the relationship between language and morality? In pursuit of these questions, we will focus on developing a comprehensive understanding of literary elements in order to analyze, synthesize, and apply the tools that authors use to develop our own powerful voices. This year in turn will not only strengthen your writing and critical thinking skills but will also prepare you for the ELA MCAS Exam you will be taking in the spring.

English III

Grades: 11, 12

English 11 investigates the complexity of American identity by considering its origins, its changes over time, and its challenges. Students approach these issues by studying texts that present a diverse array of voices, considering how race, gender, class, and other factors impact identity. They engage with the texts through discussion, writing, and creative activities such as performance and lesson planning. By the end of the course, students will be able to use the texts as evidence as they add their voices to larger conversations about what it means to be American.

Stories, Songs and Suspense: Creative writing/Fiction Elective

Grades: 11, 12

In this elective, open to rising juniors and seniors, students will immerse themselves in the creative writing process, putting together a portfolio of work over the course of the year. Each quarter will focus on reading and writing a different genre of fiction. To maximize time spent creating original works, our reading will focus on short stories and novel chapters rather than on entire novels. Readings will include both classic and contemporary stories; in the mystery/suspense unit, for example, we might read both a Sherlock Holmes (Conan Doyle) or Detective Poirot (Agatha Christie) story, as well as one from a modern master like Stephen King. While the curriculum for the course has yet to be finalized, a tentative plan is as follows: Quarter 1: short stories; Quarter 2: sci-fi/fantasy and mystery/suspense/thriller; Quarter 3: screenwriting/playwriting and songwriting; Quarter 4: independent study and writing project, which could focus on any of the former genres, as well as those not previously covered (e.g., poetry, graphic novels, etc.). **The class is appropriate for writers of all skill levels as long as they are**

motivated to write and enthusiastic about using their imaginations! You'll develop strong writing habits, your skills will improve, and you'll have fun in the process!

AP English Language & Composition 11

Grade(s): 11

Pre-requisites: Must apply through your English teacher

The AP English Language and Composition course is designed to help students become analytical, rhetorical readers and writers. Students in this course are taught to read critically by focusing their attention on the choices that authors make in relation to social contexts, audiences, and purposes. In conjunction with reading and analyzing texts of such variety, students will also be required to produce formal and informal writings of the same sort; consequently, the course helps students become skilled, rhetorical writers who compose for a variety of purposes within a variety of contexts. Students learn to write while making their own choices that pay strict attention to social contexts, target audiences, rhetorical modes, and overall purposes.

AP English Language & Composition 12

Grade(s): 12

The AP English Language and Composition course is designed to help students become analytical, rhetorical readers and writers. In this course, students are taught to read critically by focusing their attention on the choices that authors make in relation to social contexts, audiences, and purposes. In conjunction with reading and analyzing texts, students produce formal and informal writings, including analytical essays, persuasive letters, and original arguments on topics that interest them. AP Lang & Comp 12 helps students become skilled rhetorical writers who compose for a variety of purposes and to reach a variety of different audiences.

AP English Literature

Grade(s): 12

Pre-requisites: Must have taken AP English Language & Culture

The AP English Literature and Composition course is designed to help students further develop their abilities to critically read and write about literature. Students in this course read widely and deeply, and they engage in focused writing assignments on the texts at hand. The goal of this class is to prepare students to successfully pass the AP Exam and to succeed in college-level literature classes.

Writing Composition

Grade(s): 12

Writing Compositions is designed to develop students' writing abilities in order to prepare them for college and/or careers. The course will explore different writing styles and techniques; from writing professional emails to writing creative works. Students will read and analyze published works and the work of their peers, as well as writing and sharing their own works, all with the goal of improving their own writing.

Spanish Department

Novice Spanish

Grades: 9, 10, 11

Novice Spanish is a course designed to present students with introductory aspects of Spanish language and culture. Students will learn vocabulary and structures for basic communication. At the end of this course, students will be able to have basic interactions in Spanish, such as introducing themselves, sharing information about school, families, and some hispanic traditions using simple memorized structures in the target language.

Intermediate Spanish

Grades: 9, 10, 11

Intermediate Spanish is a course expand students' abilities in the target language by exposing them to more complex structures and further vocabulary. Students will expand their understanding of the hispanic world by learning about important people, traditions, stories, and legends. Students will access content through readers designed for students proficiency level. At the end of this course, students will be able to have interactions in Spanish both in oral and written form using a more varied vocabulary and using simple sentences in different tenses. Students will also be able to express their opinion on familiar topics with some ease.

Advanced Spanish

Grades: 10, 11, 12

Advanced Spanish is a course designed to expand students' spoken abilities in the target language. In this course, students will be both exposed to higher structures and vocabulary, but will also have more opportunities for spoken interaction in formal and informal contexts. Students will engage in these discussions through thematic units that range from studying the local Hispanic restaurants to analyzing the consequences of the Spanish Civil War. At the end of this course, students will be able to have more pre-planned interactions in Spanish both in oral and written form using a more varied vocabulary and using a mix of simple and complex sentences in different tenses. Students will also be able to express their opinion on familiar topics with ease.

Introductory Spanish for Heritage Speakers

Grades: 9, 10, 11

Introductory Spanish for Heritage Speakers is a course fully-taught in Spanish, designed for students who identify as heritage speakers, which means they enter the course with Spanish medium-high spoken proficiency, but struggle with reading or writing in this language due to having had little to no formal education in Spanish. The main focus of this course is analysing what it means to be Latinx from different experiences that allow students to gain a better understanding, awareness, and value of themselves and their cultures. In this course, students will enhance their oral production in Spanish and will learn about the rules of use of Spanish in written formal and informal settings.

Pre-AP Spanish: Language and Culture

Grades: 9, 10, 11, 12

Pre-AP Spanish: Language and Culture is a course fully-taught in Spanish, designed for students who identify as heritage or native speakers speakers. The students in this class have high Spanish spoken proficiency and medium reading and writing skills. The main focus of this course is developing skills that prepare students to be successful in AP Spanish: Language and Culture, such as developing stronger reading strategies to gain better comprehension of texts, such as identifying main idea and making inferences for meaning; being exposed to different types of texts, both fiction and non-fiction; participating in presentations in academic and non-academic settings; and engaging in interpersonal communication in formal and informal conditions.

AP Spanish Language & Culture

Grades: 10, 11, 12

Pre-requisites: Must have taken and passed Pre-AP Spanish: Language and Culture

The AP® Spanish Language and Culture course is a rigorous college-level course taught exclusively in Spanish that requires students to improve their proficiency across the three modes of communication. The course focuses on the integration of authentic resources and communicate using rich, advanced vocabulary and linguistic structures as they build proficiency in all modes of communication toward the pre-advanced level and pass the AP exam in the spring.

Advanced Spanish Seminar

Grades: 11, 12

This course is entirely in Spanish and is aligned to AP Spanish Literature and Culture and prepares students to participate in oral and written discussions on texts and contexts by asking probing or follow-up questions and providing answers that elaborate on main points. Their participation in oral and written discussions goes beyond providing information about texts; they can interpret texts and contexts, and state and support their opinions with some textual details.

AP Spanish Literature – Independent Study

Grade(s): 12

Pre-requisites: Must have taken AP Spanish Language & Advanced Spanish Seminar

The goal of this course is for students to independently prepare for the AP Spanish Literature exam. Students opt into this class as a fourth year of Spanish. Students meet with a teacher two sessions per week and work independently for the other two sessions per week. Students read, analyze, and respond in writing and orally to a list of selected texts from the College Board spanning the history of Hispanic literature and culture.

History Department

World History Foundations 1

Grades: 9th

World History Foundations 1 provides students with an overview of ancient and classical era World History. Students analyze how ancient and classical era peoples created religious belief systems, organized political philosophies, and interacted with the land. Additionally, students practice historical thinking skills such as primary source analysis, corroboration of sources, and written argumentation skills.

Language of History

Grades: 9th

World History Foundations 1 provides students with an overview of ancient and classical era World History. Students analyze how ancient and classical era peoples created religious belief systems, organized political philosophies, and interacted with the land. Additionally, students practice historical thinking skills such as primary source analysis, corroboration of sources, and written argumentation skills.

US History Foundations

Grades: 10th

US History Foundations 1 provides students with an overview of United States history. Students analyze how democratic principles were the foundation of the United States, and consider how over the course of history various groups have fought to uphold those principles in a quest for equality. Additionally, students practice historical thinking skills such as primary source analysis, corroboration of sources, and written argumentation skills.

World History I

Grades: 9

Pre-AP 9th grade World History will cover human history from 10,000 BCE to 1450 CE in a single school year. Students will study key themes and concepts from all parts of the world in order to identify regional and global connections, comparisons and changes throughout time. This pre-AP course will focus on developing key historical thinking skills and on examining the five themes of the AP World History curriculum: human interaction with the environment, development and interaction of cultures, state-building, expansion and conflict, creation, expansion and interaction of economic systems, and development and transformation of social structures. Students will be assessed on their understanding of historical skills, content, and themes.

This course is designed to prepare students with foundational critical thinking and writing skills by providing key reading strategies and primary source analysis. Students will also be prepared to take AP World History in 10th grade, if they choose.

World History II

Grades: 10

The focus of this course is the study of the historical development of people, places, and patterns of life from from 1450-present. Students will use skills of historical and geographical analysis to dig into primary and secondary sources.

World History is literally the greatest story ever told; it is about you, me, and the billions of people that have come before us. The knowledge gained in this class will help students understand people, cultures, and customs that may be very different from their own. The work will be focused around human rights and their importance to the course of history as well, as to today. How has the protection of human rights – and the abuse of human rights – evolved throughout modern history? How were these rights defined? Who had a seat at the table when these choices were made? How did they gain this position of power Why did these people make these choices? Who was not consulted, but deeply impacted, by these decisions? The goal is that by the end of the course students understand why and how choices are made that change our world, so that they know how to get a seat at the table where these decisions are being made.

AP Modern World History

Grades: 10

Pre-requisites: Must apply through your History teacher

Students use analytic skills and write extensively on the major themes of history from the foundations of civilization to the present day. Students are given the opportunity to "do history" by using the steps a historian would in analyzing historical events and evidence worldwide. The study of Africa, the Americas, Asia, and Europe offers a balanced coverage of world history. All students take the College Board Advanced Placement Examination.

The course will briefly review the history of the world between 1200CE and 1450CE, with the primary focus being on 1450CE-present This course will examine the choices that shape the world we live in today. As students look at these choices they will also ask the following questions: Who had a seat at the table when these choices were made? How did they gain this position of power? Why did these people make these choices? Who was not consulted, but deeply impacted by these decisions? The goal is that by the end of the course you understand why and how choices are made that change our world, so that as you leave this building you know how to get a seat at the table where these decisions are being made. AP World History is a rigorous, fast paced course. As a result, students will be required to complete reading, writing, and other assignments outside of class

US History

Grades: 11, 12

US History is a required course that students must take their junior or senior year (unless they take AP US History). US History covers the development of the American nation, from colonialism to the present-day. This course is a conceptual look at changing American culture, politics, environment and economy. The course's intent is to help students better understand the themes of history which shaped and continue to impact our lives. The course also challenges the knowledge gained from the World History course and applies that background to America's perspective of the 20th Century. Students will analyze the democratic values that created the foundation of the United States. In each unit, students will look for these values and identify times in US history when people worked towards furthering these goals. Students will also study discriminatory practices and times when the United States failed to uphold these values, but always with the focus of how activists fought to regain those democratic ideals. Learning through this focus allows students to form a better understanding of our world today and how to actively work towards being an active democratic participant

AP US History

Grades: 11, 12

Pre-requisites: Must apply through your History teacher

This course will survey the history of the United States of America from approximately 1492 to modern times. Students investigate the development of American economics, politics, and culture through historical analysis grounded in primary sources, research, and writing The primary focus of the course will be to provide students with an opportunity to develop an understanding of the major themes in American history, to train students to analyze historical evidence, and to develop in students the ability to analyze and express historical understanding in writing. AP US History is a rigorous, fast paced course. As a result, students will be required to complete reading, writing, and other assignments outside of class

AP Government and Politics

Grade(s): 12

Pre-requisites: Must apply through your History teacher

AP Government and Politics is a college level course that explores the political theory and everyday practice that direct the daily operation of the U.S. government and shape our public policies. It will also provide the students with an analytical perspective on government and politics in the United States. This course includes both the study of general concepts used to interpret U.S. government and politics and analysis of specific examples. The express purpose of this course is to prepare students to take the AP Exam for U.S. Government and Politics. Students will have the opportunity to learn about the Constitution *says* the government should work, and how it really looks today. For example, what does the Constitution say about impeachment? How is(was) Trump's impeachment actually being handled in the House and the Senate? How do political parties impact that process, and how does the media shape our perceptions of it?

Civics Foundations

Grade(s): 11, 12

The Foundations Civics course is intended to introduce high school students to concepts of American government and civic engagement. During this course, students will read, write, and discuss American government documents, the American criminal justice system, and the role of the press, among other government topics. The development of critical thinking and argumentative writing skills will be emphasized.

Latin American Studies

Grade(s): 12

This course is designed to provide students with an overview of the history of the Americas and inter-American relations from 1800 to the present day. The course explores the international history of Latin America and the United States from a variety of U.S and Latin American perspectives. Each student will be assigned a country that they will represent throughout the course as we approach each turning point in the relationship between the Latin American countries and the US. The course is primarily project based and explores major themes such as the concepts of imperialism, neo-colonialism and anti-imperialism, revolution and counter-revolution, nationalism and interventionism, democracy and dictatorship, human rights and repression, development and dependency, the 'war on drugs' and migration.

AP Economics

Grade(s): 11, 12

AP Macroeconomics is a course that gives students understanding of the principles of how economics systems function. Students will study concepts like national income and price-level determination. Students will also study the financial sector, economic growth, and international economics. Students who are interested in studying business would be interested in this course. Students should be comfortable with math, including Algebra. Students who find success most easily in this course have strong analytical abilities, although, with hard work students will do well.

Black/African-American Studies

Grade(s): 11, 12

This class is designed to provide students with an overview he experiences of people of African descent in Black Atlantic societies, including the United States, the Caribbean, and Latin America. Students explore the innovative, complex, and distinctively African American social structures

and cultural traditions that Africans in the diaspora have created. Students are exposed to the historical, cultural, political, economic, and social development of people of African descent.

Math Department

Pre-Algebra Foundations

Grade(s): 9th

Pre-Algebra Foundations provides instruction in number sense, geometry, statistics, and an introduction to algebra.

Algebra 1

Grade(s): 9th

Algebra I provides instruction in number sense, algebraic reasoning, and computational fluency.

Honors Geometry

Grade(s): 9th

Honors Geometry provides instruction in angle relationships, congruence, similarity, measurement, trigonometry, and an introduction to mathematical proof.

Geometry

Grade(s): 10th

Geometry provides instruction in angle relationships, congruence, similarity, measurement, and trigonometry.

Integrated Math 1

Grades: 10th

Integrated Math 1 will develop skills students learned in Pre-Algebra Foundations. Whilst primarily an introductory course to Algebra and Geometry, students will also take units in Statistics.

Honors Algebra II

Grade(s): 10th

Honors Algebra II provides instruction in functions, modeling, rational and complex numbers, and rates of change. Honors Algebra II will prepare students to move on to Honors Precalculus.

Integrated Math 2

Grades: 11, 12

Integrated Math 2 will develop skills students learned in Integrated Math 1 and will equip students to meet all State Standards. This course expands on the Algebra, Geometry, and Statistics concepts

Honors Precalculus

Grade(s): 11, 12

Honors Precalculus provides instruction in function families, equation manipulation, function transformation, the unit circle, and modeling. Honors Precalculus will prepare students to move on to AP Calculus AB or Statistics/AP Statistics.

Precalculus 12

Grade(s): 12

Precalculus 12 provides instruction in function families, equation manipulation, function transformation, the unit circle, and modeling. Precalculus 12 will prepare students to move on to Calculus I in college.

AP Calculus AB

Grade(s): 12

Pre-requisites: Passing Honors Precalculus

AP Calculus AB provides instruction in limits, derivatives, and integrals. AP Calculus AB will prepare students for AP Calculus AB Exam and to move on to Calculus II in college.

Essentials of Mathematics

Grade(s): 9, 10, 11

Math Essentials will serve students who are still developing the English language and math skills necessary to participate in a mainstream math class. This course will accommodate students at different levels of mathematical ability, though the focus will be primarily Pre-Algebra and Algebra I skills.

Practical Mathematics

Grade(s): 12

Practical Mathematics will prepare seniors who have taken foundations level math courses for the mathematical tasks they will encounter most often in their everyday life. The focus will be applying mathematical reasoning and number skills to essential, real-world situations.

Statistics/AP Statistics

Grade(s): 12

Prerequisites: There are no prerequisites for this course

Statistics will prepare students to use data to help understand the world around them. Statistics will prepare students for the AP Statistics test if they elect to do some supplemental work.

Science Department

Biology

Grades: 9, 10

Biology is the study of all living things and this course will serve as an introduction to each aspect of that study. Beginning with the chemical building blocks that make up living organisms, we will explore all aspects of life from the cellular to ecological level. In this course you will learn the vocabulary used by biologists to discuss the structures and processes of living things. You will also explore models and laboratory experiments that illustrate the complex systems and relationships that make up cells, organisms, populations, and ecosystems.

Biology Foundations/Biology Essentials

Grades: 9th, 10th

By the end of this course students will have gained a solid foundation in biological science. MLL students will also gain additional support with academic and content language through daily reading, writing, listening, and speaking practice.

Chemistry

Grades: 10, 11

The 10th grade chemistry course is intended to provide students with a deep foundational understanding of the principles of physical chemistry. We investigate matter broadly, and explore specific properties of matter that lead to the different phenomena we see in the world around us. By understanding the structure and properties of atoms, we will be able to more deeply understand how and why atoms interact to form the materials and reactions we see around us. Throughout the course, we reinforce our understanding of the content through hands on experiences in the lab. Mathematics and critical thinking also play important roles in this course as they allow us to use our knowledge to answer new and novel questions.

Chemistry Foundations

Grades: 10th

Students will gain an understanding of matter and the structure and properties of atoms. This knowledge will serve as the foundation for learning how and why atoms interact to form the materials and reactions that we see in the real world. Students will reinforce their understanding through hands on experiences in a laboratory setting.

Physics

Grades: 11 and 12

Physics is an advanced level science class that satisfies the high school graduation requirement of a physical science class. The physics curriculum includes interactions of matter and energy, velocity, accelerations, force, energy, momentum and charge. Students will be challenged to apply their knowledge of the laws of physics to solve physics related critical thinking problems.

AP Biology

Grade(s): 11, 12

Pre-requisites: Students with high grades in Science and on the PSAT will automatically be considered for AP Biology.

The AP Biology course is designed to be the equivalent of the general Biology course usually taken during the first year of college. For most students, the course enables them to undertake, as a freshman, second year work in the Biology sequence at their institution or to register in courses in other fields where general chemistry is a prerequisite. This course involves learning about Biology through investigation and laboratory investigations. AP Biology is open to all students that have completed a year of Biology who wish to take part in a rigorous and academically challenging course.

AP Chemistry

Grade(s): 11, 12

Pre-requisites: Students with high grades in Science and on the PSAT will automatically be considered for AP Chemistry.

The AP Chemistry course is designed to be the equivalent of the general chemistry course usually taken during the first year of college. For most students, the course enables them to undertake, as a freshman, second year work in the chemistry sequence at their institution or to register in courses in other fields where general chemistry is a prerequisite. This course is structured around the six big ideas articulated in the AP Chemistry curriculum framework provided by the College Board. A special emphasis will be placed on the seven science practices, which capture important aspects of the work that scientists engage in, with learning objectives that combine content with inquiry and reasoning skills. AP

Chemistry is open to all students that have completed a year of chemistry who wish to take part in a rigorous and academically challenging course.

AP Physics

Grade(s): 12

Pre-requisites: Students with high grades in Science and on the PSAT will automatically be considered for AP Physics.

The Physics C: Mechanics course is equivalent to a one-semester, calculus-based, college-level physics course. It is especially appropriate for students planning to specialize or major in physical science or engineering. The course explores topics such as kinematics; Newton's laws of motion; work, energy and power; systems of particles and linear momentum; circular motion and rotation; and oscillations and gravitation. Introductory differential and integral calculus is used throughout the course. The AP Physics C: Electricity and Magnetism course ordinarily forms the second part of the college sequence that serves as the foundation in physics for students majoring in the physical sciences or engineering. The sequence is parallel to or preceded by mathematics courses that include calculus. Methods of calculus are used wherever appropriate in formulating physical principles and in applying them to physical problems. Strong emphasis is placed on solving a variety of challenging problems, some requiring calculus. While the subject matter of the AP Physics C: Electricity and Magnetism course is principally electricity and magnetism, some colleges and universities include additional topics such as wave motion, thermal physics, optics, alternating current circuits, or special relativity in this type of second semester course.

ELECTIVES DEPARTMENT

Physical Education

Grades: 9, 10, 11, 12– Required for all students

Each unit will focus on a different facet of physical fitness, beginning with a baseline test. Following the baseline test (using fitness tests from both the Presidential Physical Fitness Assessment and the European Fitness Battery), student will engage in an intervention phase, ending each unit with a re-test. At the conclusion of the year, students will receive a full transcript (report card) with details of all strengths and areas for improvement.

Grade Level Seminar- 9

Grades: 9th – Required for all students

The foundation of choosing a post-secondary path and ultimately being successful on that path is identity development. From there students learn to make daily decisions (how will I study for this test?), short-term decisions (what do I want to do this summer?) and long-term decisions (what do I want to do after high-school) that align with who they are and what is important to them. Additionally, students need to develop the non-cognitive skills and mindsets (goal-setting, reflection, growth mindset, self-efficacy, realistic self-appraisal, utilizing supports) they will need for life success, as well as to be exposed to the content knowledge around college and career that is necessary to make informed decisions for themselves. This course aims to begin to work with students in those areas.

Grade Level Seminar – 10

Grades: 10th – Required for all students

How do I determine which opportunities are best fits for me?

This is the guiding question that we will be reflecting on in this course as we build upon the identity and values exploration done in the 9th Grade Seminar and start to set long-term goals for careers that might be good fits in the future. To do this, we will explore the wide variety of careers available and use each of our individual values, interests and goals to identify areas of best fit. We will also focus on the importance of summer opportunities and you will be provided with support to prepare and apply for opportunities that are in line with your long-term goals and interests. Additionally, our last unit of the year will discuss practical and responsible decision-making related to your personal finances in the short- and long-term. The work done in 10th Grade Seminar will serve as the critical foundation for our college and career counseling process to come in the 11th and 12th grades.

Grade Level Seminar – 11

Grades: 11th – Required for all students

Grade Level Seminar in 11th grade prepares students for the college and post-secondary opportunities process. In quarters 1-3, students prepare for the PSAT and SAT by taking English and Math SAT prep courses. In quarter 4, students focus on beginning college and other post-secondary program applications and are taught by their College & Career counselor.

Grade Level Seminar – 12

Grades: 12th – Required for all students

Grade Level Seminar in 12th grade is designed to prepare students for their post-secondary options. Students focus on applications in the first semester and the post-secondary transition in the second.

Elective Pathways

Pathway	Course 1	Course 2	Course 3	Course 4
Studio Arts	Studio Art 1	Studio Art 2	Pre-AP Studio Art	AP Studio Art & Design 2D, Art & Design 3D or Drawing
Performing Arts	Performing Arts 1	Performing Arts 2	Advanced Performing Arts 3	
Computer Science	Computer Science Essentials	AP Computer Science Principles	AP Computer Science A	
Biomedical Sciences	Principles of Biomedical Sciences	Human Body Systems	Medical Interventions	

Arts Electives

Studio Art 1 is an immersive introduction to visual art at the high school level. Students focus on solidifying their knowledge of the basic elements of art as well as the principles of design. These foundations are taught against the background theme of identity. Students will have the chance to gain increased self-awareness through exploring their emotions and identity in art pieces. After an initial introduction, students study in-depth painting, drawing, sculpture, and designing their own projects. This course is for students who like playing with visual images, making things with their hands, and want to gain more art technique. This course is a prerequisite for taking Studio Art 2, Pre-AP or AP art.

Studio Art 2 continues to allow students to immerse themselves in artmaking while also thinking more deeply about the ideas behind art. The theme for the class is culture, and students will learn how art shapes culture, how history influences art and culture,and how artists comment on contemporary culture. These learnings will help them make their own responses in art to the world around them. They will also explore new varieties of media like printmaking, weaving, and murals. Skills from Art 1 will be taught on a deeper level. **Prerequisite: Studio Art 1 or portfolio approval**

Pre-AP Art is an upper level class where students investigate art from around the world and use that information to experiment and increase their skills. For each quarter, students learn about art from different time periods, beginning with ancient history and working up to art made today. At the end of each quarter, students get to make an art project of their choosing, investigating one topic they'd like to know more about. Students are encouraged to experiment, try new things, and get better at techniques. This class prepares students to be able to handle the rigor of AP art the next year. **Prerequisite: Studio Art 2 or portfolio approval**

AP Art gives you the opportunity to design and create your own art project resulting in a high-quality portfolio. Students first pick an area of focus by choosing an AP portfolio section, including focusing on the principles of design with the 2d Art & Design Portfolio, exploring 3 dimensions with the 3d Art & Design Portfolio, or mastering their drawing skills with the Drawing Portfolio. Students create a question for themselves related to that portfolio at the beginning of the year and investigate that question through their artwork. Classes are mostly independent work time on art intermixed with museum visits, class critiques, and short assignments. This class can help students create a portfolio for college applications or be a way to deeply explore their art interests. **Prerequisite: Pre-AP art or portfolio approval**

Performing Arts 1 is an elective introducing students to all aspects of the theater, both on and off-stage. Students will spend about half the year learning and practicing performance skills, with several informal performance opportunities, including but not limited to scene showings, one-act performances, and improv jams. In the other quarters, students will learn and practice set, costume, and sound design skills and will have the opportunity to create designs based on short plays. Students who take this course will be eligible in future years to take Performing Arts 2: a theater course focused on play production.

Performing Arts 2 focuses on all aspects of play production and culminates in two formal, full-length productions. In Performing Arts 2, students apply the skills they've learned by producing two productions - a published play and a student-written work. Students who choose to perform will engage in all aspects of the rehearsal and performance process including developing a character, memorizing lines, and performing in front of a paying audience. Students who choose to design will both envision and create the set, costumes, and sounds for the productions. Students in Performing Arts 2 will sometimes be expected to attend weekend or after school work sessions. Students who take this course will be eligible in future years to take Advanced Performing Arts 3: an advanced theater course focused on training students to take on leadership roles in our productions. **Prerequisite: Performing Arts 1**

Advanced Performing Arts 3 focuses on leadership roles in all aspects of play production. In Advanced Performing Arts 3, students will take on leadership roles during our productions. Students focused on design will take on positions like Head of Design, Technical Director, Production Manager, and Stage Manager. Students focused on performance will be expected to take on larger roles in our productions as well as positions like Rehearsal Manager and Student Director. Students will complete an end-of-year project that is completely student led. All students in Performing Arts 3 will be expected to attend frequent outside-of-class work sessions. **Prerequisite: Performing Arts 1 and 2**

STEM ELECTIVES

Pathway	Course 1	Course 2	Course 3	Course 4
Computer Science	Computer Science Essentials	AP Computer Science Principles	Honors Python	
Biomedical Sciences	Principles of Biomedical Sciences	Human Body Systems	Medical Interventions	Biomedical Innovations

Computer Science Essentials

Grade(s): 9, 10, 11, 12

This course provides a foundation for students in programming and computational thinking. In this course, students start by using block-based-programming to create animations and games. Students then transition to text based languages, using HTML/CSS and Python to design webpages and create interactive programs. This course is a prerequisite to AP Computer Science Principles.

AP Computer Science Principles

Grade(s): 10, 11, 12

Prerequisites: Final Computer Science Essentials grade of 70 or greater, or teacher recommendation

This course builds off student's programming experience from CSE, and challenges them to explore how computing and technology can impact the world. You'll learn how the internet works, how data can be used to tell a story, cybersecurity topics and advanced programming in Python. AP CSP is as much about learning how to program and create programs, as it is about learning how computers and the internet work. This course culminates in an AP Exam and portfolio, which will be submitted to College Board.

Honors Python

Grade(s): 11, 12

Prerequisites: Final AP Computer Science Principles grade of 80 or greater, or teacher recommendation

Honors Python is a college-level course exploring the fundamentals of computer science in the context of the Python programming language. Students develop fluency with Python's built-in functionality as they build programs to solve problems. Key topics include algorithm design, utilization of loops and lists, variable scope, file processing, and object-oriented programming. Strongly recommended for students who want to

pursue a Computer Science major or study Computer Science further.

Principles of Biomedical Science

Grade(s): 9, 10, 11, 12

Principles of Biomedical Science is the first elective in the medical science track. This course is appropriate for students who are interested in building skills and knowledge in the medical field. Students work collaboratively to solve medical mysteries and engage in hands-on activities like dissecting a sheep's heart. By exploring concepts within biology and medicine, students will determine the factors that led to the death of a fictional character, Anna Garcia. Principles of Biomedical Science is part of Project Lead the Way's Biomedical Science Pathway; students who take this course will be eligible to take Human Body Systems, Medical Interventions, and Biomedical Innovation in future years

Human Body Systems

Grade(s): 10, 11, 12

Prerequisites: Final Principles of Biomedical Science grade of 70 or greater. Juniors can skip PBS and take HBS if their final grade for their science class in their junior year is a 70 or greater.

Human body second elective in the medical science elective track. This course is appropriate for students who enjoyed Principles of biomedical science and want to continue to learn about biomedical skills and the human body. Students work both independently and collaboratively to learn about body systems and diagnose patients based on symptoms and test results. Our focus will be learning about body systems and pinpointing what part of the system breaks down in various diseases. Each unit will cover a different body system including the visual, skeletal, nervous, immune, digestive, respiratory, and urinary systems. Students who take this course will be eligible to take Medical Interventions, and Biomedical Innovation in future years

Medical Interventions

Grade(s): 11, 12

Prerequisites: Final Human Body Systems grade of 70 or greater. Can take this course without taking PBS and HBS if student took AP Biology and final grade is a 70 or greater.

Medical Interventions is the third elective in the medical science elective track. This course will follow the Smith Family throughout their medical history. Each unit will follow a different member of the family with various health issues. We will dive deep into their diagnosis and create potential treatment plans. Skills and topics will include electrophoresis, polymerase chain reaction, tissue typing, laparoscopic surgery skills, suturing, and cell morphology.

Psychology Seminar

Grade(s): 11, 12

This special seminar will be open to Seniors who are interested in exploring topics of psychology but are not yet ready to take an AP Psychology course or Juniors who would benefit from taking a psychology class before enrolling in the AP section. See the AP Psychology course description for more details on the topics.

AP Psychology

Grade(s): 12

Prerequisites: Final AP Biology grade C or better, final current non AP science class grade or B or better, or teacher recommendation. If student took Psych Seminar, it is the teacher's decision.

The Advanced Placement Psychology course is equivalent to a college introductory Psychology course. It is designed to introduce students to the systematic and scientific study of human behavior and mental processes. Students are exposed to the psychological facts, principles, and phenomena associated with each of the major subfields within psychology. They will also learn about the ethics and methods psychologists use in their science and practice. The development of critical thinking skills, oral and written communication, and critical evaluation of research methods will be emphasized.

Attachment 4: Applicant Group Resumes and Biographical Information

Elizabeth Matson
elizabeth.s.matson@gmail.com
401.339.8257

EDUCATION

University of North Carolina at Chapel Hill- Chapel Hill, NC

May 2016
Master of School Administration
GPA: 4.0

Boston College- Chestnut Hill, MA

May 2009
Bachelor of Arts in Psychology and Philosophy
GPA: 3.86
Honors: Magna Cum Laude

- Dean's List First Honors
- Psi Chi Society
- Golden Key International Honor Society
- Sr. Thea Bowman Scholar
- Alpha Sigma Nu-Jesuit Honor Society

City University- London, England

Spring 2008

- Cultural immersion and study abroad program

WORK EXPERIENCE

Excel Academy Charter Schools

September 2018-present
Director of Special Projects - Network Team

- Project management of network school expansion
- Ongoing management of school culture re-structure across the network
- Plan and execute internal and community events throughout the school year
- Assist in network school operations

North Carolina Connections Academy

August 2016-June 2018
K-5 Assistant Principal

- Led instructional audit and realignment of K-5 curriculum
- Coached and provided feedback to a team of 12 elementary teachers that led to an average of 10% student growth over one year on state end of year assessments
- Created and executed statewide testing strategic plan for over 1600 students in grades 3-10
- Designed and delivered ongoing professional development for over 25 staff members
- Developed PBIS system for use in grades K-5

Morris Grove Elementary School- Chapel Hill, NC

August 2015-June 2016
Full-time Principal Intern

- Created and facilitated staff professional development based on SIP needs
- Planned, staffed, and managed 10 week long after school tutoring program for 40 academically fragile students
- Served as case manager for MTSS students
- Provided clinical supervision and PDP feedback to staff members through use of the North Carolina Educator Evaluation System

Everett Gaskins Hancock LLP- Raleigh, NC

Summer 2015

Summer Research Assistant

- Researched and developed a presentation for NC Superintendents on charter school effectiveness

Maureen Joy Charter School-Durham, NC

August 2013-June 2015

1st Grade Teacher and Founding K-5 Enrichment Specialist

- Researched, developed, and implemented first ever K-5 enrichment curriculum

Blackstone Valley Prep Mayoral Academy- Cumberland, RI

August 2012-June 2013

1st Grade Teacher

- Led students to a 96% average on network-wide math assessments
- Produced an average of 1.7 years of reading growth in students by end of year assessments

RDW Group, Inc.-Providence, RI

August 2011-July 2012

Account Executive

- Planned and executed content on social media platforms generating a 19% engagement rate and 97% retention rate with over 4,000 likes
- Created and implemented strategies to bring awareness and recognition to clients and their events resulting in a 250% increase in attendance at client venue over two month period

Teach For America-New Haven, CT

June 2009-2013

First grade Teacher at Achievement First Amistad Academy Elementary School

- Led students to an average of a 96% across six different interim assessments and an end of year nation-wide assessment in math
- Led 100% of students to a year and a half of growth or more in reading levels
- Interviewed prospective Teach For America applicants

PROFESSIONAL DEVELOPMENT

- Presented and facilitated Teach Like a Champion professional development to entire staff
- Participated in district and in-house literacy professional development
- Participated in district Equity 101 workshop
- Participated in monthly district-wide principal and assistant principal meetings

LICENSURE

- K-12 Principal, State of North Carolina
- NC Elementary Education SP-2 Professional Educator's License

LEADERSHIP AND ACTIVITIES

NC PDK Emerging Leaders

Fall 2015

- Selected to participate in ongoing professional development for emerging North Carolina school leaders
- Developed leadership skills in the areas of curriculum and instruction, digital leadership, education policy, and equity

CERTIFICATIONS, SKILLS, and INTERESTS

Certification: CPI: non-violent crisis intervention, CPR

Language Skills: conversational in French

Computer Skills: highly proficient in Microsoft Office, Pinterest, Facebook, Instagram, and twitter

Owen Stearns
ostearns@excelacademy.org

EDUCATION

Amherst College- Amherst, MA
Bachelor of Arts in American Studies

WORK EXPERIENCE

Excel Academy Charter Schools, *Chief Executive Officer*

Jun. 2013-Present

- Organizational leader for one of the highest-performing school networks in Massachusetts, consistently outperforming district and state benchmarks on test scores and college access/completion.
- Led Excel's evolution to a network of four schools and 1400 students, and specifically the launch of a new high school.
- Lead a 14-person Network Team focused on finance, operations, talent recruitment, program, and fundraising.
- Directly managed Grad Services department - 5 full-time staff who support Excel's students through college completion.
- Ran successful hiring process for 3 school leaders, new CFO/COO, and new CAO.
- Raised over $12M to support this growth, including the building of a new HS facility that was completed ahead of schedule and over $1M under-budget.
- Recognized as EY Entrepreneur of the Year for New England in 2019 (Social Impact category).

Inspire Inc., *Board Member*

Mar. 2008-Sept. 2018

- Founded in 1998, Inspire is a nonprofit 501(c)(3) organization applying management consulting strategies, tools, and techniques to help other nonprofits achieve greater social impact.
- Inspire is run by a completely volunteer staff of junior consultants from Bain & Company, The Monitor Group, The Parthenon Group, L.E.K. Consulting, and Katzenbach Partners who devote time to Inspire projects in addition to their full-time consulting jobs.

Excel Academy Charter Schools, *Board Member and Chair*

Mar. 2003-Apr. 2013

- Founding Board Chair of one of the highest-performing charter schools in Massachusetts, serving students from East Boston and Chelsea who ranked in the top 5 on state tests for 7 consecutive years. Successfully built a highly-engaged board and led two national searches for new organizational leaders. Presided over Excel's growth from a single-school to a network of 4 schools.

Monitor Institute*, Associate Partner*

Apr. 2005-Jan. 2013

- Senior adviser to nonprofits and foundations on issues of strategy, organizational development - usually connected to growth. Clients included Acumen Fund, The Boston Foundation, Peer Health Exchange, Pathways to Education, Charter Schools and Friendship Public Charter Schools.

Foundation Strategy Group, *Senior Consultant*

Jun. 2001-Mar. 2005

- Strategy consulting to foundations - private, community and corporate - to help them create more social impact. Similar approach and responsibilities as at larger strategy firms such as McKinsey.

The City School, *Co-Director for Organizational Development*

1999-2001

CHARLES A. LOMBARDI

Present Position

- Mayor, Town of North Providence (Inaugurated April, 2007)

Previous Employment

- Owner/Operator of Luxury Cleaners, a family-owned business with six locations, for 40+ years now celebrating 72 years in business

Miscellaneous

- Former Volunteer Fire Captain - North Providence Fire Department – 20 years
- Former member of North Providence Town Council (1979 through 1989)
- Former Town Council President (1987-1989)
- Life Member – Marieville Fire Department
- Inducted into Rhode Island Boys & Girls Club Hall of Fame 2008
- Former President, Blackstone Valley Firemens' League
- Former Member, Rhode Island State Personnel Appeals Board
- Vice President, RI League of Cities and Towns
- Board Chairman, Hope Academy Charter School
- Board Member, Achievement First Charter School
- Board Member, R.I. Resource Recovery Corp.

Personal

- Married to wife, Carol
- Father of Tarra Ferrara and Charles, Jr.
- Grandfather of Allie, Nicholas, Christopher, Sloane, Stella & Lucia

Mayor Elorza

As Providence's 38th Mayor, Jorge O. Elorza is driven by the belief that the strength of a community lies in the ability of its residents to share equally in its growth and progress. Since taking office in January 2015, Mayor Elorza has prioritized social, economic, educational, financial, and health equity and opportunities for Providence neighbors and businesses.

As a member of the United States Conferences of Mayors, Mayor Elorza serves as Vice-Chair of the Standing Committee on Community Development and Housing, co-chairs the Committee for Immigration Reform, and is a member of the Conference's Advisory Board. The Mayor has been an outspoken national voice on issues such as immigration reform, healthcare, and environmental protection, placing an emphasis on the work done at the local level.

Born and raised in Providence, Mayor Elorza is a graduate of Classical High school, the University of Rhode Island, and Harvard Law School. Prior to being elected Mayor, he served as a Providence Housing Court Judge and co-founded the Latino Policy Institute while he served as a professor at Roger Williams Law School. Mayor Elorza lives with his wife, Stephanie, and his son, Omar, in the Silver Lake neighborhood.

Mayor Diossa

Mayor James A. Diossa was born and raised in Central Falls. He attended Becker College in Massachusetts, where he earned a Bachelor's Degree in Criminal Justice. Concerned by the direction Central Falls was heading in, and the fact that so many young people were leaving the city in search of better opportunities elsewhere, James decided to get involved. With the help of a small group of friends and family, James launched a grassroots campaign to represent the 4th Ward on the Central Falls City Council. Despite very limited resources and no prior political experience, he went head to head with a well-known councilman backed by the local political machine and won.

In 2012, as the city was plunged into an unprecedented fiscal and political crisis, Diossa ran for Mayor and won decisively. Since being sworn in as the city's first Latino Mayor, Diossa has been recognized for his efforts to restore honest governance, fiscal sustainability and civic pride to Central Falls. He has been successful in securing millions in federal and foundation funding for quality of life and infrastructure improvements to the city. He is widely credited with restored confidence in the Mayor's office and energizing a new generation of civic leaders. And he led the city out of bankruptcy to the point where Standard & Poor's has raised Central Falls' long-term bond rating to "BBB" investment grade.

Now in his second and final term as Mayor of the "comeback city" Diossa is working hard to ensure Central Falls' continued success for years to come.

Attachment 5: Table of Board Appointments, Roles, and Responsibilities

Position	Role	Appointment
Chair	Presides over all meetings; leads the Board in enforcement of all applicable laws, regulations, and policies; ensures the Board fulfills its oversight and fiduciary duties	The Honorable Jorge Elorza, Mayor of the City of Providence
Vice Chair	Fills the role of Chair at any meetings in which the Chair is not present; in the event that the Chair position is vacated, assumes the role for the duration of the term	TBD
Secretary	Provides written notice, materials and agendas for all meetings of the Board. Maintains and files meeting minutes; maintains all required documentation of the Board and its members	TBD (skillsets sought include prior experience on a non-profit board in Rhode Island; strong organizational skills
Treasurer	Serves as the Chair of the Finance Committee; manages the Board's financial oversight responsibilities including ensuring an annual audit is conducted and an annual budget is approved. Works with management to ensure appropriate financial reports are provided to the Board in a timely manner.	TBD (skillsets sought strong knowledge and understanding of financial accounting for non-profit organizations and public schools in Rhode Island)

Attachment 6: Prospective Board Member Resumes and Biographical Information

Mayor Elorza
Board Chair

As Providence's 38th Mayor, Jorge O. Elorza is driven by the belief that the strength of a community lies in the ability of its residents to share equally in its growth and progress. Since taking office in January 2015, Mayor Elorza has prioritized social, economic, educational, financial, and health equity and opportunities for Providence neighbors and businesses.

As a member of the United States Conferences of Mayors, Mayor Elorza serves as Vice-Chair of the Standing Committee on Community Development and Housing, co-chairs the Committee for Immigration Reform, and is a member of the Conference's Advisory Board. The Mayor has been an outspoken national voice on issues such as immigration reform, healthcare, and environmental protection, placing an emphasis on the work done at the local level.

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Attachment 7: Draft Bylaws

EXCEL ACADEMY RHODE ISLAND
BYLAWS
(As Adopted on _____, ____, 2020)

TABLE OF CONTENTS

ARTICLES

Article I
PURPOSES, MISSION, AND POWERS

Section 1. Purposes. Excel Academy Rhode Island ("School") is a Mayoral Academy public charter school established pursuant to the provisions of Title 16 Chapter 77.4 of the Rhode Island General Laws, and is organized to carry out the purposes set forth in its charter and in the School's Articles of Incorporation ("Articles of Incorporation").

Section 2. Mission. The mission of the School is to prepare K-12 students from Providence, Central Falls, and North Providence to succeed in high school and college, apply their learning to solve relevant problems, and engage productively in their communities.

Section 3. Legal Status. The School is a charter public school operated and governed pursuant to a charter granted by the Council on Elementary and Secondary Education and managed by a Board of Trustees pursuant to Rhode Island General Laws, Title 16, Chapter 77.4. The Board of Trustees is a public body and Trustees are considered public officials. The School shall have any purposes and powers as may be permitted by Rhode Island General Laws, Title 16, Chapter 77.4, as amended from time to time, or any successor statute, the Charter and these By- Laws.

Section 4. Powers. The School will have all the powers enumerated in law, regulation, its Charter and the power either directly or indirectly, either alone or in conjunction and/or cooperation with others, to do any and all lawful acts and things and to engage in any and all lawful activities which may be necessary, useful, suitable, desirable or proper for the furtherance, accomplishment, fostering or attainment of any or all of the purposes for which the School is organized, and to aid or assist other organizations whose activities are such as to further accomplish, foster, or attain any of the School's purposes.

Section 4.1. Limitations. The School will exercise its powers only in furtherance of exempt purposes as such terms are defined in Section 501(c)(3) of the Internal Revenue Code of 1986, as amended, and the regulations from time to time promulgated thereunder ("Code").

Section 5. Corporate Seal. The common seal for the School is, and until otherwise ordered and directed by the Board of Trustees shall be, an impression upon paper bearing the name of the School, the date the School's Charter was granted and such other device or inscription as the Board of Trustees may determine.

Article II
NON-PROFIT STATUS

Section 1. Non-Profit Status. The School is organized exclusively for charitable, religious, educational, and scientific purposes under Section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code. The School is not organized for profit and, unless otherwise permitted by of the Rhode Island Non-Profit Corporation Act, R.I.G.L. § 7-6-31, et seq, as from time to time amended ("Non-Profit Corporation Act"), or any other applicable law, no part of the net earnings of the School will inure to the benefit of or be distributable to any member, Trustee, or Officer of the School or any other person, except that the School will be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in its Charter and its Articles of Incorporation.

Section 2. Dissolution. The dissolution of the School shall be authorized only upon the advance affirmative vote of the Board of Trustees. Upon the dissolution of the School, assets shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or corresponding section of any future federal tax code, or shall be distributed to the federal government, or to a state or local government, for a public purpose. Any such assets not disposed of shall be disposed of by a court of competent jurisdiction in the county in which the principal office of the organization is then located, exclusively for such purposes or to such organization or organizations, as said Court shall determine, which are organized and operated exclusively for such purposes.

Section 2.1. Process. The Board of Trustees of the School, after the payment and discharge of or provision for all its debts and obligations, will distribute all of the assets of the School to such organization or organizations which, at the time of distribution, qualify or could qualify as exempt from federal income tax under Section 501(c) of the Code. In the event of any liquidation or dissolution of the School, no Trustee or Officer will be entitled to any distribution or division of the School's property or the proceeds thereof, and upon such liquidation the Board of Trustees of the School, after the payment and discharge of or provision for all its debts and obligations, shall distribute all of the assets of the School to such organization or organizations which, at the time of distribution, qualify or could qualify as exempt from federal income tax under Section 501(c) of the Code.

Section 2.2. Undisposed Assets. Any of such assets not so disposed of will be disposed of by a court of competent jurisdiction of the county in which the principal office of the School is then located, exclusively for such purposes or to such organization(s) as said court will determine, which are organized and operated exclusively as organizations exempt from federal income tax under Section 501(c) of the Code.

Article III
OFFICES

Section 1. Offices. The School will have its principal office consistent with its Articles of Incorporation, and may have other offices at such places within and outside the State of Rhode Island as may from time to time be determined by the Board of Trustees.

Article IV
MEMBERS

Section 1. Members. The School will have no members.

Article V
BOARD OF TRUSTEES

Section 1. School Management. The Board of Trustees ("Board of Trustees") will manage the business, property, and affairs of the School and, unless the responsibility is otherwise delegated, the entire care, control, and management of the School shall be vested in the Board of Trustees.

Section 2. Powers and Responsibilities. The responsibilities of the Board of Trustees will include oversight of the progress of the School, including the review, implementation and approval of the School's vision, mission, budget and strategic plan; establishment of the School's general policies and overall curriculum policies; approval and monitoring the School's annual budget and financial procedures; management of the School's funds;; assurance that the School achieves academic success for its students; assurance that the School complies with applicable laws and regulations; assurance that the

School fulfills its Charter and earns Charter renewal; enhancement of the School's strength, viability and public image; and any other powers and duties not otherwise reserved by the Commissioner of Elementary and Secondary education, the Board of Education, and the Council on Elementary and Secondary Education. In addition, the Board of Trustees shall have the following powers and responsibilities:

(1) To identify educational needs in the community.
(2) To develop education policies to meet the needs of the community.
(3) To provide for and ensure the implementation of federal and state laws, the regulations of the council on elementary and secondary education, and School policies, programs, and directives.
(4) To provide for the evaluation of the performance of the School.
(5) To have responsibility for the care and control of the School.
(6) To have overall policy responsibility for the employment and discipline of School personnel.
(7) To approve a master plan defining goals and objectives of the School.
(8) To provide for the location, care, control, and management of the School facilities and equipment.
(9) To adopt the School's budget.
(10) To adopt any changes in the School's budget during the course of the school year.
(11) To approve expenditures in the absence of a budget, consistent with state law.
(12) To establish minimum standards for personnel, to adopt personnel policies, and to approve a table of organization.
(13) To establish standards for the evaluation of personnel.
(14) To establish standards for conduct in the School and for disciplinary actions.
(15) To hear appeals from disciplinary actions.
(16) To enter into contracts
(17) To publish policy manuals that shall include all the School's policies.
(18) To establish policies governing curriculum, courses of instruction, and text books.
(19) To provide for transportation services that meet or exceed standards of the council on elementary and secondary education.
(20) To make any reports to the department of education as are required by the council on elementary and secondary education.
(21) To delegate, consistent with law, any responsibilities to the Chief Executive Officer as the Board of Trustees may deem appropriate.
(22) To address the health and wellness of students and employees.
(23) To establish a subcommittee of the Board of Trustees to decrease obesity and address school health and wellness policies for students and employees consistent with § 16-21-28.

Section 3. Number. The Board of Trustees will be made up of individual Trustees ("Trustees" or "Trustee"). The number of Trustees on the Board of Trustees will not exceed fifteen (15) nor be less than seven (7).

Section 4. Qualification. Trustees will be individuals who have consented to acceptance of responsibility to further the achievement of the mission of the School.

Section 5. Composition. The Board of Trustees will be comprised of individuals from the community the School serves and will strive to consist of a balanced group of individuals composed of different races, ethnicities, ages, sexes and occupations. In addition, the Board of Trustees shall include representatives from Providence, Central Falls, and North Providence and shall be chaired by a mayor of Providence, Central Falls, or North Providence.

Section 6. Duties. Duties of a Trustee include, but are not limited to, a duty of care, a duty of loyalty, a duty of obedience, and any other duties, fiduciary or otherwise, that may exist at law.

Section 7. Election/Appointment. Trustees shall be elected or appointed by the following process: 1) a two-thirds (2/3) majority of the Trustees present at a meeting at which a quorum is present shall vote to submit a proposed Board member appointment for approval to the Commissioner of Education or the Council on Elementary and Secondary Education; and 2) the Commissioner of Education or the Council Elementary and Secondary Education formally approves the appointment, in writing.

The Board of Trustees shall exercise due diligence in assessing the suitability of candidates for Board membership with respect to potential conflicts of interest and areas of skill and expertise that will be of value to the Board of Trustees, such due diligence to occur prior to a vote by the Board of Trustees to request the Commissioner or the Council on Elementary and Secondary Education to appoint the proposed member(s) to the Board of Trustees.

Section 8. Term. The Trustees will serve for three (3) year terms. Trustee terms will be staggered whenever possible. Trustees may serve no more than _____(X) total terms.

Section 9. Vacancies. Any vacancy occurring on the Board of Trustees will be filled in the same manner as such Trustee was selected in accordance with these bylaws. A Trustee appointed to fill a vacancy will serve for the unexpired term of his or her predecessor in office.

Section 10. Resignations. Any Trustee may resign at any time by giving written notice to the Board of Trustees. The resignation will take effect upon formal acknowledgment, by vote at a properly-noticed meeting, by the Board of Trustees and upon

approval by the Commissioner of Education or the Council on Elementary and Secondary Education.

Section 11. Removal. Any Trustee may be removed from office by a three-fourth (3/4) majority vote of the full Board of Trustees, with subsequent approval by the Commissioner of Education or the Council on Elementary and Secondary Education, whenever the best interests of the School will be served thereby.

Section 12. Quorum. At all meetings of the Board of Trustees, a majority of the Board of Trustees will constitute a quorum.

Section 13. Board Act. The act of a majority of the Trustees present at a meeting at which a quorum is present will be the act of the Board of Trustees, unless the act of a greater number of Trustees is required by the Non-Profit Corporation Act, the Articles of Incorporation, Rhode Island General Laws, or these bylaws.

Section 14. Compensation Prohibition. Trustees may not be paid compensation for performance of their duties as Trustees except that Trustees may be reimbursed for out-of-pocket expenses spent in performance of their duties as Trustees. No Trustee will be precluded from serving the School in any other capacity and receiving compensation therefore, so long as such service complies with the Rhode Island Code of Ethics.

Section 15. Open Meetings Act. The Board of Trustees will adhere to the strictures of the Rhode Island Open Meetings Act.

Section 16. Complaint Process. The Board of Trustees will convene to hear and act upon complaints received by School employees and students (or their families / guardians) only after School administration has issued an initial decision concerning the complaint. No hearing may be held without a quorum of the Board of Trustees, and any Trustee with a conflict of interest related to a complaint shall not participate. Complaints will be received and heard in accordance with the School's policies and all applicable laws and regulations. The Board of Trustees may assign the initial review and investigation of the complaint to a subcommittee in accordance with these bylaws. The Board of Trustees shall make all final decisions regarding any complaint. Decisions of the Board of Trustees shall be made by a majority vote of a quorum of the Board of Trustees present for a hearing.

Article VI
OFFICERS

Section 1. Officers. The officers of the School will be a Chairperson, Vice Chairperson, Secretary, and Treasurer ("Officers"). The Board of Trustees may from time to

time elect or appoint such other Officers, including one or more vice or assistant Officers, and with such titles as it may deem necessary or convenient.

Section 2. Election. The Officers of the School will be elected annually by the Board of Trustees of the School at each annual meeting or meeting in lieu thereof. Election of an Officer will not of itself create contract rights.

Section 3. Term. Each Officer will be elected to serve a term of one year immediately following each such meeting, or until his or her successor will have been elected and will have qualified or until his or her earlier death, resignation, or removal, as hereinafter provided.

Section 4. Vacancies. A vacancy in any office by reason of death, resignation, removal or otherwise may be filled by the Board of Trustees for the unexpired portion of the term.

Section 4. Resignations. Any Officer may resign at any time by giving written notice to the Board of Trustees or to the Chairperson thereof. A resignation will take effect upon formal acknowledgment, by vote at a properly-noticed meeting, by the Board of Trustees.

Section 6. Removal. Any Officer may be removed from office at any time, with or without cause, by a three-fourth (3/4) majority vote of the full Board of Trustees whenever the best interests of the School will be served thereby.

Section 7. Chairperson. The Mayor of Providence, Central Falls, or North Providence shall serve as the Chairperson of the Board and will preside at all meetings of the Board of Trustees, or designate another Trustee to preside in his/her stead. The Chairperson may sign, swear to, execute, file, certify or acknowledge any documents, instruments, agreements, articles, statements, certificates, or reports, required or permitted to be signed, sworn to, executed, filed, certified, or acknowledged by an Officer of the School. The Chairperson will have such other powers and duties as may from time to time be prescribed by the bylaws or by resolutions of the Board of Trustees.

Section 8. Vice Chairperson. In the absence of the Chairperson or in the event of the Chairperson's death, resignation, inability, or refusal to act, the Vice Chairperson will perform the duties of Chairperson and when so acting, will have all the powers of and be subject to all the restrictions upon the Chairperson. The Vice Chairperson will perform such other duties as from time to time may be assigned to the Vice Chairperson by the Chairperson or by the Board of Trustees.

Section 9. Secretary. The records of all business transacted at each meeting of the Board of Trustees will be kept under the direction and supervision of the Secretary. The Secretary will have such further powers and perform such further duties as will be assigned to him or her by the Chairperson, Vice Chairperson, or the Board of Trustees.

Section 10. Treasurer. The Treasurer will be responsible for and will keep all financial reports and records and other financial documents of the School. The Treasurer will have such further powers and perform such further duties as will be assigned to him or her by the Chairperson, Vice Chairperson, or the Board of Trustees.

Section 11. Other Officers. All other Officers of the School will have the powers and will perform the duties customarily appurtenant to their respective offices, and will have such further powers and will perform such further duties as may from time to time be assigned to them by the Chairperson, Vice Chairperson, or the Board of Trustees.

Section 12. Clerk. The Clerk shall record and maintain records of all proceedings of the Trustees in a book or series of books kept for that purpose and shall give such notices of meetings of Trustees as are required by the Charter, these By-Laws or by law. The Clerk shall have such other powers and duties as are usually incident to that office and as may be vested in that office by, these By-Laws or by the Board of Trustees. In the absence of the Clerk from any meeting of the Board of Trustees, a temporary Clerk designated by the person presiding at the meeting shall perform the duties of the Clerk.

Article VII
COMMITTEES

Section 1. Committees. The Board of Trustees may designate one or more committees as the Board of Trustees may determine necessary or appropriate. Such committee or committees will have such name or names as determined from time to time by the Board of Trustees. The Board of Trustees may at any time change the members of, fill vacancies in, limit, expand or alter the authority of, and discharge any committee.

Section 2. Nature. Any committees will be advisory in nature and will not supplant the duties and responsibilities of the Board of Trustees.

Section 3. Membership. The membership of a committee is not limited to Trustees, but each committee will consist of no less than two Trustees as elected by the Board of Trustees.

Section 4. Quorum. At all committee meetings, a majority of the members of the committee will constitute a quorum.

Section 5. Open Meetings Act. Each committee will adhere to the strictures of the Rhode Island Open Meetings Act.

Section 6. Standing Committees. The Board will have and maintain standing committees as set forth in these bylaws.

Section 6.1. Executive. The Executive Committee will be made up of the Officers of the Board of Trustees. The Executive Committee will manage routine Board functions. The Executive Committee will determine the agendas and recommendations to be brought to the Board of Trustees, although agenda items and motions for action may also be proposed by any Trustee at a meeting.

Section 6.2. Finance. The Treasurer will serve as chair of the Finance Committee. The Finance Committee will have such powers as are assigned from time to time by the Board of Trustees, including without limitation responsibility for general oversight of fiscal operations and participation in the annual budget process, while not overstepping the boundary between administrative and board functions.

(a) Fiscal Operations. The Finance Committee will be responsible for, including without limitation, ensuring that qualified staff are in charge of the day-to-day fiscal operations of the School; ensuring that a financial audit is conducted annually by a qualified independent auditor; assisting in the establishment and implementation of fiscal policies and procedures; reviewing financial reports with the board on a regular basis; and ensuring the budget is adhered to and the School remains solvent, with reserves established as deemed appropriate by the Board of Trustees.

Section 6.3. Academic Oversight. The Academic Oversight Committee will have such powers as are assigned from time to time by the Board of Trustees, including without limitation responsibility for reviewing the School's performance to ensure it meets the goals outlined in the School's Accountability Plan.

(a) School Performance. The Academic Oversight Committee will monitor the performance of the School and its students, and related compliance reports to ensure that the academic goals articulated and adopted in the School's Accountability Plan are achieved. The Academic Oversight Committee will work with the School's Chief Executive Officer to propose annual goals and milestones in accordance with the Accountability Plan.

Section 6.4. Community Outreach. The Community Outreach Committee will have such powers as are assigned from time to time by the Board of Trustees, including without limitation responsibility for proposing the School outreach plan, which will be designed to ensure the School reaches every eligible student and will include methods likely to achieve the School's target student population and will address how the School will be publicized and marketed throughout the community.

Section 6.5. Governance. The Governance Committee will have such powers as are assigned from time to time by the Board of Trustees, including without limitation

responsibility for preparing a slate of candidates who match the recruiting priorities to be nominated for election by the Board of Trustees pursuant to these bylaws.

Section 6.6. Building. The Building Committee will have such powers will have such powers as are assigned from time to time by the Board of Trustees. In additions, the Building Committee shall be comprised of those individuals and shall have those duties set forth in the Council on Elementary and Secondary Education's School Construction Regulations.

Article VIII
NOTICE

Section 1. General. Whenever under the provisions of the Non-Profit Corporation Act, the Articles of Incorporation, these bylaws, or Rhode Island General Laws written notice is required to be given to any Trustee.

Section 2. Manner. Notice to a Trustee may be given by mail or by a generally recognized overnight delivery service, addressed to such person at his, her or its address as it appears in the records of the School, with postage or delivery charges thereon prepaid, and such notice will be deemed to be delivered at the time when the same will be deposited in the United States mail or delivered to the delivery service.

Section 2.1. Electronic or Other Notice. Notice may be given to any Trustee by electronic mail, personally or by telephone to his or her house or office either directly or by leaving a message thereat.

Section 3. Waiver. Whenever any notice is required to be given under the provisions of the Non-Profit Corporation Act, the Articles of Incorporation, these bylaws, or Rhode Island General Law a waiver thereof in writing, signed by the person or persons entitled to such notice and who did not receive the same, whether before or after the time stated therein, will be deemed equivalent to the giving of such notice. Attendance of a person at a meeting will constitute a waiver of notice of such meeting, except when the person attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened.

Section 4. Public Notice. The Board of Trustees shall provide written notice of regularly scheduled meetings at the beginning of each calendar year. The notice shall include the dates, times, and places of the meetings and shall be provided to members of the public upon request and to the secretary of state at the beginning of each calendar year.

(a) Notice of all meetings, irrespective of type and including, but not necessarily limited to, committees or subcommittee meetings, will comply with the Rhode Island Open Meetings Act.

Section 4.1. Supplemental Notice. The Board of Trustees shall give supplemental written public notice of any meeting within a minimum of forty-eight (48) hours, excluding weekends and state holidays in the count of hours, before the date.

Section 4.2. Posting. Written public notice will include, but need not be limited to, posting a copy of the notice at School, and in at least one other prominent place within the School as well as filed electronically to the Rhode Island Secretary of State website.

Section 4.3. Content. The notice, in the form of an agenda for the meeting, will include, in addition to date, time and place, a statement specifying the nature of the business of each item to be discussed.

Section 4.3. Amendment. The notice, or agenda, for any meeting may be amended by majority vote of a quorum of the Board of Trustees, but only for informational purposes. No vote may occur on the added agenda item except for when necessary to address an unexpected occurrence requiring immediate action or to refer the matter to an appropriate committee or subcommittee.

Section 4.4. Compliance with Rhode Island Open Meetings Act. The Board of Trustees shall, at all times, comply with the Rhode Island Open Meetings Act.

Article IX
MEETINGS

Section 1. Open Meetings Act. The Board of Trustees will comply with all provisions of the Rhode Island Open Meetings Act, R.I.G.L. § 42-46-1, *et seq.* or any successor statute, as in effect from time to time ("Open Meetings Act").

Section 2. Public Meetings. All meetings, irrespective of type and including, but not necessarily limited to, committee or subcommittee meetings, will comply with the requirements of the Open Meetings Act.

Section 2.1 Executive Session. Every meeting of the Board of Trustees will be open to the public unless closed pursuant to R.I.G.L. § 42-46-4 and § 42-46-5 of the Open Meetings Act. Such meetings will be in accordance with these bylaws as not inconsistent with the applicable provision of the Open Meetings Act.

Section 3. Annual Meeting. The annual meeting of the Board of Trustees will be held forty-five (45) days after the end of the School's fiscal year, unless an alternative date is designated by the Board of Trustees. The annual meeting will be held for recommending the appointment of Trustees whose terms expire, electing Officers and for transacting such other business as may properly come before the meeting. If for any reason the annual meeting of the Board of Trustees will not be held, a special meeting in lieu of the annual meeting of the Board of Trustees may be held.

Section 4. Regular Meetings. The Board of Trustees will hold regular meetings, and will do so in accordance with the Open Meetings Act. Regular meetings of the Board of Trustees will be held monthly or on such other schedule as is determined by the Board of Trustees. The Board of Trustees will cause a schedule of regular meetings to be given to each Trustee and to the public.

Section 5. Special Meetings. Special meetings of the Board of Trustees may be called, and on the written request of three (3) Trustees, will be called by the Chairperson. The Chairperson will fix the manner and place for the holding of any special meeting of the Board of Trustees. All aspects of special meetings will comply with the requirements of the Open Meetings Act.

Section 6. Emergency Meetings. Emergency meetings of the Board of Trustees may be called and held in accordance with the Open Meetings Act at any time where the public welfare so requires. Emergency meetings will be held at the request of the Chairperson or upon the written request of three (3) Trustees. A majority of the Board of Trustees must vote in open session to address the reason and/or issue(s) that is the cause for the emergency meeting, and the Board of Trustees must state in open session and record in its minutes the reason and/or issues that is the cause for the emergency meeting. No vote will occur on such reason or issues except for when necessary to address an unexpected occurrence requiring immediate action or to refer the matter to an appropriate committee or subcommittee

Section 6.1. Notice. Notice of such meeting to the public will be posted as soon as practicable and include the date, time and place of the meeting and a statement or agenda specifying the nature of business to be conducted at the emergency meeting, as will be exclusively discussed at the emergency meeting.

Section 7. Place. The Board of Trustees will fix the place for the holding of the annual meeting and regular meetings of the Board of Trustees to be held in the State of Rhode Island. The Chairperson will also fix the place for the holding of special meetings and emergency meetings. All meetings, irrespective of type and including, but not necessarily limited to, committee or subcommittee meetings will be held in a place that is accessible to the public including those with disabilities. In the absence of any designation for the place of any meeting, the meeting will be held at the principal office of the School.

Section 8. Minutes. The minutes will include, but need not be limited to: the date, time and place of the meeting; the Trustees recorded as either present or absent; a record by individual Trustees of any vote taken; and any other information relevant to the business of the School that any Trustees requests be included or reflected in the minutes. Minutes will be made available to the public in accordance with the Open Meetings Act.

Article X

RULES OF ORDER

Section 1. Rules of Order. The proceedings of the School will be governed by *Robert's Rules of Order, Newly Revised*, except where these rules conflict with provisions of applicable law, these bylaws, or any special rules of order the School may adopt.

Section 2. Rules and Procedures. The School may from time to time promulgate such other reasonable rules and procedures as not inconsistent with the provisions of the Open Meetings Act as it determines may be desirable regarding the School's meetings.

Article XI
OPERATIONS AND STAFF

Section 1. Chief Executive Officer. The management of the School's day-to-day operations will be entrusted by the Board of Trustees to the Chief Executive Officer and to such other management staff as may be required.

Section 2. Employment. All staff will be employed according to policies established by the Board of Trustees.

Section 3. Policies. The Board of Trustees will have the ability and authority to enact, amend, and put in place such policies as the Board of Trustees determines appropriate and necessary concerning the operations, management, and business of the School.

Article XII
CONTRACTS AND FINANCIAL MANAGMENT

Section 1. Contracts. The Board of Trustees may authorize any Officer or Officers or agent or agents to enter into any contract or execute and deliver any instrument in the name of and on behalf of the School, and such authority may be general of confined to specific instances.

Section 2. Supplemental Policy. The Board of Trustees may supplement this article with a Financial Management Policy, which it may amend from time to time.

Section 2. Loans. No loans will be contracted on behalf of the School and no evidences of indebtedness will be issued in its name unless authorized by a resolution of the Board of Trustees. Such authority may be general or confined to specific instances.

Section 3. Checks, Drafts, Etc. All checks, drafts, or other orders for the payment of money, notes, or other evidences of indebtedness issued in the name of the School, will be signed by such Officer or Officers, agent or agents, of the School and in such manner as will from time to time be determined by the Board of Trustees.

Section 4. Deposits. All funds of the School not otherwise employed will be deposited from time to time to the credit of the School in such banks, trust companies, or other depositories as the Board of Trustees may select.

Article XIII
CONFLICTS OF INTEREST

Section 1. Code of Ethics. The School and its Trustees will adhere to the highest standards of ethical conduct, respect the public trust and the rights of all persons, be open, accountable and responsive, avoid the appearance of impropriety, and not use their position for private gain or advantage in accordance with the Rhode Island Code of Ethics, R.I.G.L. § 36-14-1, et seq. or any successor statute, as in effect from time to time ("Code of Ethics").

Section 2. Supplemental Policy. The Board of Trustees may supplement this article with a Conflict Interest Policy, which it may amend from time to time.

Section 3. Contracts or Transactions. No contract or transaction between the School and one or more of its Trustees or between the School and any other corporation, partnership, association, or other organization in which one or more of the School's Trustees or Officers have a financial interest will be void or voidable, nor will such Trustee be liable with respect to such contract or transaction solely for this reason, or solely because the Trustee is present at or participates in the meeting of the Board of Trustees at which the contract or transaction was authorized, or solely because the vote of the Trustee is counted for such purpose, provided that:

(a) The material facts as to the Trustee's relationship or interest are disclosed or are known to the Board of Trustees, and the Board of Trustees authorizes, approves, or ratifies any contract or transaction in which the Trustee has an interest by an affirmative vote of the disinterested members of the Board of Trustees; or

(b) The contract or transaction in which the Trustee has an interest is fair and reasonable to the School.

Section 4. Disclosure. Notwithstanding anything to the contrary herein contained, all Trustees will promptly disclose all potential conflicts of interest to the Board of Trustees prior to any consideration of any matter in which a potential conflict of interest exists. If a potential conflict of interest is determined to exist by the Chairperson and/or other Trustees with whom the Chairperson chooses to discuss such potential conflict of interest, the Trustee with the conflict of interest will recuse from discussing and abstain from voting on the matter.

Article XIV
FISCAL YEAR

Section 1. Fiscal Year. The fiscal year of the School will begin on the first day of July and end on the last day of June.

Article XV
LIABLITY AND INDEMNIFICATION

Section 1. Liability. No Trustee of the School shall be personally liable to the School for monetary damages for breach of such Trustee's duty as a Trustee, except for liability for: (i) any breach of the Trustee's duties; (ii) acts or omissions not in good faith or which involve intentional misconduct or a knowing violation of the law; or (iii) any transaction from which the Trustee derived an improper personal benefit.

Section 2. Insurances. Reasonable and adequate coverage will be maintained to protect the interests and liabilities of the School as well as the Board of Trustees and the School's employees. The Chief Executive Officer, with the advice and consent of the Board, shall review insurance Policies carefully before renewal each year.

Section 3. Indemnification. The School will indemnify any person who is or was a Trustee, Officer, employee, or agent of the School, or is or was serving at the request of the School as an Officer, employee or agent of another corporation, partnership, joint venture, trust or other enterprise, in the manner and to the fullest extent provided by applicable law, if: (i) he or she conducted himself or herself in good faith; (ii) he or she reasonably believed, in the case of conduct in his or her official capacity with the School, that his or her conduct was in its best interest, and in all other cases, that his or her conduct was at least not opposed to its best interests; and (iii) in the case of any criminal proceeding, he or she had no reasonable cause to believe his or her conduct was unlawful.

Article XVI
AMENDMENTS

Section 1. Amendments. The Board of Trustees may, by vote of at least two-thirds of the full Board of Trustees, alter, amend or repeal the bylaws, or adopt new bylaws at any annual, regular, or special meeting of the Board of Trustees.

CERTIFICATION AND AMENDMENT:

_____
Signature, Chairperson
Print Name:
Date:

Attachment 8: School Leader Job Description

EXECUTIVE PRINCIPAL – JOB DESCRIPTION

The Executive Principal will have overall accountability for the success of the School and will serve as its instructional leader. He or she will work closely with the administrative team to manage the school's culture, academic program, and operations. Though the Executive Principal will lead a school that adheres to the core Excel systems, culture and philosophy, he or she will be empowered to innovate and adapt the model as needed. Excel believes that its distinctive performance is rooted in the quality of its leadership, and Excel's organizational philosophy centers on investing in people—starting with and flowing from the Executive Principal.

Executive Principal Competencies

Excel seeks candidates with the qualities and skills to become an outstanding Executive Principal:

- Provide intellectual leadership translating big-picture vision into action
    - Develop big-picture vision to take school/program to the next level
    - Translate big-picture vision into day-to-day implementation needs
    - Understand all aspects of Excel model in depth
    - Lead team reflection in structured and insightful manner
- Create the culture and conditions for relentless adult learning
    - Set ambitious, measurable goalposts for team based on big-picture vision
    - Secure high level of buy-in among staff to vision and goalposts
    - Promote key learning habits
    - Anticipate challenges and plan in advance
    - Use data-based adaptive learning cycle (assess-reflect-act)
    - Translate learning into systems that get uniformly applied
    - Act as communication hub to ensure that staff always have information they need
    - Celebrate staff members' success frequently and visibly
    - Promote unyielding adherence to a high bar for performance
- Model Excel norms, culture and behavior
    - Embody all school norms
    - Display above-and-beyond work ethic
    - Model exceptional teaching, classroom management and use of school systems
    - Manage own/others' time and complex plate of projects efficiently
    - Exude contagious passion for own professional development
- Coach, develop and retain high-performing instructional staff
    - Help others learn and "self-discover" opportunities for improvement through a balance of keen observation, inquiry and advocacy
    - Be accessible and highly visible to staff
    - Connect with others both professionally and personally
    - Empower others and trust them to do their job
    - Give and receive constructive feedback
    - Put staff in situations to take risks & grow professionally
    - Handle difficult conversations/situations promptly & frankly
- Act as an effective leader and ambassador for the organization
    - Build strong trust-based relationships with all school stakeholders

- Communicate effectively as school ambassador, tailoring message as needed
- Serve as an active contributor on Excel's leadership team

Qualifications

- A Bachelor's degree required, Master's degree preferred;
- A minimum of four years of experience in an urban public high school or charter school setting preferred, but not required;
- Proven track-record of strong results in school leadership;
- The ability to speak Spanish preferred;
- Strong strategic thinking skills with clear and nuanced understanding of the impact that different approaches have on organizational culture and performance;
- Systematic and structured approach to project management with a demonstrated ability to carry out multiple high-priority projects in parallel;
- A commitment to promoting educational equity;
- An unwavering commitment to and belief in the mission of Excel Academy Charter Schools, including Excel's values and educational model;
- The ability to focus and thrive in a fast paced, entrepreneurial environment;
- The ability to work effectively in a team environment and the willingness and desire to support others in doing their best work; and
- An entrepreneurial spirit that reflects an openness to change, a willingness to problem-solve, and an interest in developing new ideas & programs.

EXCEL ACADEMY CHARTER SCHOOL, FRIENDS OF EXCEL ACADEMY CHARTER SCHOOLS, INC., EXCEL ACADEMY EAST BOSTON REALTY CORPORATION AND EXCEL ACADEMY BREMEN STREET REALTY CORPORATION

COMBINED GENERAL PURPOSE FINANCIAL STATEMENTS IN
ACCORDANCE WITH GOVERNMENT AUDITING STANDARDS
AND UNIFORM GUIDANCE
JUNE 30, 2019 AND 2018

EXCEL ACADEMY CHARTER SCHOOL,
FRIENDS OF EXCEL ACADEMY CHARTER SCHOOLS, INC.,
EXCEL ACADEMY EAST BOSTON REALTY CORPORATION AND
EXCEL ACADEMY BREMEN STREET REALTY CORPORATION

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June 30, 2019 and 2018

AAFCPAs
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Unmodified Opinion on Combined General Purpose Financial Statements Accompanied by Other Information – Governmental Entity

Independent Auditor's Report

To the Boards of Trustees of
Excel Academy Charter School,
Friends of Excel Academy Charter Schools, Inc. and
Excel Academy Bremen Street Realty Corporation:

Report on the Combined General Purpose Financial Statements

We have audited the accompanying combined general purpose financial statements of Excel Academy Charter School (a Massachusetts charter School), Friends of Excel Academy Charter Schools, Inc., Excel Academy East Boston Realty Corporation and Excel Academy Bremen Street Realty Corporation (Massachusetts corporations, not for profit) (collectively, the Organization), which comprise the combined statements of net position as of June 30, 2019 and 2018, and the related combined statements of revenues, expenses and changes in net position and cash flows for the years then ended, and the related notes to the combined general purpose financial statements.

Management's Responsibility for the Combined General Purpose Financial Statements

Management is responsible for the preparation and fair presentation of these combined general purpose financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of combined general purpose financial statements that are free from material misstatement, whether due to fraud or error.

Auditor's Responsibility

Our responsibility is to express an opinion on these combined general purpose financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the combined general purpose financial statements are free from material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the combined general purpose financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risks of material misstatement of the combined general purpose financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the combined general purpose financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the combined general purpose financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the combined general purpose financial statements referred to on page one present fairly, in all material respects, the combined net position of Excel Academy Charter School, Friends of Excel Academy Charter Schools, Inc., Excel Academy East Boston Realty Corporation and Excel Academy Bremen Street Realty Corporation as of June 30, 2019 and 2018, and the changes in their net position and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Emphasis of Matter

As discussed in Note 11 to the combined general purpose financial statements, Excel Academy East Boston Realty Corporation dissolved in fiscal year 2019 as a result of the unwind of a New Markets Tax Structure. Our opinion is not modified with respect to this matter.

Other Matters

Required Supplemental Information

Accounting principles generally accepted in the United States of America require that the *Management's Discussion and Analysis* on pages 2 through 5 be presented to supplement the basic combined general purpose financial statements. Such information, although not a part of the basic combined general purpose financial statements, is required by the Governmental Accounting Standards Board, who considers it to be an essential part of financial reporting for placing the basic combined general purpose financial statements in an appropriate operational, economic or historical context. We have applied certain limited procedures to the required supplementary information in accordance with auditing standards generally accepted in the United States of America, which consisted of inquiries of management about the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic combined general purpose financial statements, and other knowledge we obtained during our audit of the basic combined general purpose financial statements. We do not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance.

Other Information

Our audits were conducted for the purpose of forming an opinion on the combined general purpose financial statements as a whole. The accompanying Schedule of Expenditures of Federal Awards for the year ended June 30, 2019, as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, is presented for purposes of additional analysis and is not a required part of the combined general purpose financial statements. Such information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the combined general purpose financial statements. The information has been subjected to the auditing procedures applied in the audit of the combined general purpose financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the combined general purpose financial statements or to the combined general purpose financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America. In our opinion, the information is fairly stated, in all material respects, in relation to the combined general purpose financial statements as a whole.

Other Reporting Required by Government Auditing Standards

In accordance with *Government Auditing Standards*, we have also issued our report dated October 16, 2019, on our consideration of the Organization's internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance. That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control over financial reporting and compliance.

Alexander, Aronson, Finning & Co., P.C.

Westborough, Massachusetts
October 16, 2019

The following discussion and analysis of the financial performance of Excel Academy Charter School provides an overview of the School's financial activities for the fiscal year ended June 30, 2019, and summarized comparative information for fiscal year 2018. Please read it in conjunction with the School's financial statements, which begin on page 6.

The School as a Whole

The network is recognized as Excel Academy Charter School (the School), a single-school district operating four campuses (see below) under a single charter and Board of Trustees. The charter is awarded in five year increments and is subject to renewal at the discretion of the Commonwealth of Massachusetts Board of Elementary and Secondary Education. The School's charter was most recently renewed for an additional five years effective July 1, 2018 through June 30, 2023. In February 2019, DESE approved a charter amendment for a maximum enrollment increase from 1,344 to 1,400 students.

Excel Academy-East Boston: This school campus was founded in 2003. During fiscal year 2019, this school operated grades five through eight and the enrollment was 238 students.

Excel Academy-Chelsea: This school campus was founded in 2011. During fiscal year 2019, this school operated grades five through eight and the enrollment was 230 students.

Excel Academy-Orient Heights: This school campus was founded in 2011 and opened in August 2012. During fiscal year 2019, this school operated grades five through eight and the enrollment was 232 students.

Excel Academy Charter High School: This school campus was founded in August 2015. During fiscal year 2019, this school operated grades nine through twelve and served 595 students.

Using This Annual Report

This annual report consists of a series of financial statements. In accordance with *Basic Financial Statement – Management's Discussion and Analysis - for State and Local Governments* (GASB 34), the School is considered a special purpose government entity that engages in only business-type activities. All of the financial activity of the School is recorded in an enterprise fund within the proprietary fund group. In accordance with GASB No. 34, the School issues a *Combined Statement of Net Position, Combined Statement of Revenues, Expenses and Changes in Net Position,* and a *Combined Statement of Cash Flows*. These statements provide information about the financial activities of the School, as a whole. This annual report also contains notes to the combined financial statements which provide additional information that is essential to a full understanding of the information provided in the basic combined financial statements and the schedule of federal expenditures, which identifies all of the School's federal funding.

Combined General Purpose Financial Statements

The *Combined Statement of Net Position* presents the assets, liabilities and net assets of the School as of the end of the fiscal year. The *Combined Statement of Net Position* is a point-in-time financial statement. The purpose of this statement is to present a fiscal snapshot of the School to the readers of the combined financial statements. The *Combined Statement of Net Position* includes year-end information concerning current and non-current assets, current and non-current liabilities, and net position. Net position represents the difference between assets and liabilities. Net position is displayed in three components, *net investment in capital assets, restricted program net position and unrestricted net position*. *Net investment in capital assets* consists of capital assets, net of accumulated depreciation, as well as other assets related to capital, reduced by the outstanding balances of any borrowing used for the acquisition, construction, or improvement of those assets.

Net position is reported as restricted when there are limitations imposed on their use through external restrictions imposed by creditors, grantors, contributors, or government laws or regulations of other governments. Unrestricted net position represents all other net position that does not meet the definition of *restricted program* or *net investment in capital assets*. Over time, readers of the financial statements will be able to evaluate the School's fiscal health (liquidity and solvency) or financial position by analyzing the increases and decreases in net assets to determine if the School's financial health is improving or deteriorating. The reader will also need to consider other non-financial factors such as changes in economic conditions and new or amended charter school legislation when evaluating the overall financial health of the School. This statement is also a good source for readers to determine how much the School owes to vendors and creditors and the available assets that can be used to satisfy those liabilities.

The *Combined Statement of Revenues, Expenses and Changes in Net Position* reports the financial (revenue and expenses) activities of the School and divides financial activities into two categories: *Operating activities* and *Non-operating activities*. Operating activities include all financial activities associated with the operation of the School and its related programs. Consequently, all non-operating activities include all financial activities not related to the operation of a charter school and unrestricted activities. Changes in total net position as presented on the *Combined Statement of Position* are based on the activity presented in this statement. This statement helps to determine whether the School had sufficient revenues to cover expenses during the year and its net increase or decrease in net position based on current year operations.

The *Combined Statement of Cash Flows* provides information about the School's cash receipts and cash payments during the reporting period. The statement reports cash receipts, cash payments, and net changes in cash resulting from *operations, investing*, and *capital* and *noncapital financing activities* and provides answers to such questions as "from where did cash come?," "for what was cash used?," and "what was the change in the cash balance during the reporting period?" This statement also is an important tool in helping users assess the School's ability to generate future net cash flows, its ability to meet its obligations as they come due, and its need for external financing.

Supplemental Information

The *Schedule of Expenditures of Federal Awards* is presented for the purposes of additional analysis as required by Title 2 U.S. Code of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards. The Schedule of Expenditures of Federal Awards can be found on page 34 of this report.

Financial Highlights

The following financial highlights are for the fiscal year 2019, with comparative information from fiscal year 2018:

- The School held total assets of $22,154,106 and $22,122,490 at June 30, 2019 and 2018, respectively, of which $32,026,558 and $30,095,211 were net capital assets, respectively. The majority of the remaining assets consisted of cash, tuition receivable, accounts and grants receivable, prepaid expenses, intercompany leases payable, intercompany notes receivable, and intercompany due (to) from balances.

- The School held total liabilities of $22,756,214 and $23,243,690 at June 30, 2019 and 2018, respectively. Of the School's liabilities as of June 30, 2019 and 2018, $2,018,680 and $1,956,218, respectively, were current liabilities and the majority of the remaining liabilities consisted of the long-term portion of bonds and notes payable.

- Total net position for the School was $(602,108) and $(1,121,200) at June 30, 2019 and 2018, respectively. Of the School's total net position as of June 30, 2019 and 2018, $585,948 and $39,693, respectively, was unrestricted, $2,000 and $12,755, respectively, was restricted program, and the remainder was net investment in capital assets.

- The School earned total revenues (including in-kind items) of $25,625,700 and $22,921,422 for the years ended June 30, 2019 and 2018, respectively.

- The School had total expenses (including in-kind items) of $25,106,608 and $22,886,785 for the years ended June 30, 2019 and 2018, respectively.

- The School had changes in net position of $519,092 and $34,637 for the years ended June 30, 2019 and 2018, respectively.

Budgetary Highlights

The School budgeted revenues of $22,680,690 before fundraising and budgeted expenses of $23,147,699, resulting in a budgeted net loss before fundraising of $(467,009). The School anticipated private fundraising to fill the gap. The School's actual revenues after fundraising (excluding in-kind items) of $22,287,620 and actual expenses (excluding in-kind items and intercompany payments) of $21,768,528 resulted in an actual net changes in net position of $519,092. In-kind pension of $3,203,453 and in-kind transportation and other of $134,627 had no impact on the School's changes in net position. The primary difference in budget-to actual revenue was related to the granting of un-budgeted funds from Friends of Excel Academy Charter Schools, Inc., and higher than anticipated tuition and government reimbursements. The primary difference in budget-to actual expenses was mainly due to student costs being under budget.

The School budgeted tuition per student for fiscal years ended June 30, 2019 and 2018, by using a per-pupil amount that was forecasted by DESE Charter school office in the spring of 2018 and 2017, respectively.

School's Financial Activities

The majority of the School's funding is received from the Commonwealth of Massachusetts Department of Elementary and Secondary Education and is based on a standard rate per pupil.

School's Financial Activities (Continued)

The School received $19,958,619 in per-pupil tuition funding in fiscal year 2019 versus $16,675,863 in fiscal year 2018. This represents 78% and 73% of the School's revenue for the years ended June 30, 2019 and 2018, respectively. In addition, the School received various federal, Commonwealth of Massachusetts and private grants, which totaled $1,910,997 and $2,716,182 for fiscal years 2019 and 2018, respectively.

Financial Factors

Excel Academy-East Boston: In September 2011, this school campus entered into a lease agreement with the Excel Academy East Boston Realty Corporation (EBRC) for a term of forty years for a newly acquired facility. In October 2018, EBRC assigned this lease to the Friends of Excel Academy Charter Schools, Inc. The School is liable for all expenses incurred at the property.

Excel Academy-Chelsea: In fiscal year 2018, this school campus amended its lease with ACS Development Corporation in order to expand its footprint by 4,000 square feet and extend the term of the lease to July 2031. The School is responsible for a portion of shared operating expenses and real estate tax assessments.

Excel Academy-Orient Heights: In fiscal year 2019, this school campus extended the lease agreement with the Lombardo Companies, extending from September 2019 through December 2020. The School is responsible for a portion of shared operating expenses and real estate tax assessments.

Excel Academy Charter High School: In fiscal year 2016, this school campus entered into a lease agreement with the Excel Academy Bremen Street Realty Corporation (BSRC) for a term of forty years for a newly acquired facility. In August 2018, the School and BSRC completed an expansion project at this location that added approximately 5,000 square feet of space. The School is liable for all expenses incurred at the property.

Current Known Facts, Decisions, and Conditions

There are no other current known facts, decisions and/or conditions at the time of this report.

Contacting the School's Financial Management

This financial report is designed to provide the reader with a general overview of the School's finances and to show the accountability for the funds received. If you have questions about this report or need additional financial information, contact the Organization's Business Office.

EXCEL ACADEMY CHARTER SCHOOL,
FRIENDS OF EXCEL ACADEMY CHARTER SCHOOLS, INC.,
EXCEL ACADEMY EAST BOSTON REALTY CORPORATION AND
EXCEL ACADEMY BREMEN STREET REALTY CORPORATION

Combined Statement of Net Position
June 30, 2019

Assets	Enterprise Fund - Excel Academy Charter School	Component Units - Friends of Excel Academy Charter Schools, Inc.	Component Units - Excel Academy Bremen Street Realty Corporation	Total Component Units	(Memorandum Only) Total
Current Assets:					
Cash and cash equivalents	$ 244,152	$ 3,119,694	$ 474	$ 3,120,168	$ 3,364,320
Tuition receivable	1,579,027	-	-	-	1,579,027
Current portion of accounts and grants receivable	1,011,616	1,349,250	-	1,349,250	2,360,866
Current portion of due (to) from, net	(718,340)	2,042,296	(1,323,956)	718,340	-
Current portion of intercompany leases receivable (payable)	(1,964,460)	157,591	1,806,869	1,964,460	-
Current portion of intercompany notes receivable (payable)	560,595	-	(560,595)	(560,595)	-
Prepaid expenses and other	139,941	12,288	-	12,288	152,229
Total current assets	852,531	6,681,119	(77,208)	6,603,911	7,456,442
Restricted Cash	982,617	1,115,643	-	1,115,643	2,098,260
Due (To) From, net of current portion	(964,578)	-	964,578	964,578	-
Intercompany Leases Receivable (Payable), net of current portion	(31,330,922)	8,340,442	22,990,480	31,330,922	-
Intercompany Notes Receivable (Payable), net of current portion	20,559,650	-	(20,559,650)	(20,559,650)	-
Grants Receivable, net of current portion and discount	-	1,006,197	-	1,006,197	1,006,197
Deposits	28,250	-	-	-	28,250
Capital Assets, net	32,026,558	481,651	-	481,651	32,508,209
Total assets	$ 22,154,106	$ 17,625,052	$ 3,318,200	$ 20,943,252	$ 43,097,358
Liabilities, Deferred Inflows of Resources and Net Position					
Current Liabilities:					
Current portion of bonds payable	$ 451,025	$ 118,001	$ -	$ 118,001	$ 569,026
Current portion of notes payable	109,570	-	-	-	109,570
Accounts payable	510,344	25,316	-	25,316	535,660
Accounts payable - construction	-	126,120	-	126,120	126,120
Accrued interest payable	60,000	-	-	-	60,000
Accrued expenses	887,741	2,500	-	2,500	890,241
Total current liabilities	2,018,680	271,937	-	271,937	2,290,617
Long-term Liabilities:					
Accrued rent	177,884	-	-	-	177,884
Bonds payable, net of current portion	15,539,291	3,947,795	-	3,947,795	19,487,086
Notes payable, net of current portion	5,020,359	-	-	-	5,020,359
Total liabilities	22,756,214	4,219,732	-	4,219,732	26,975,946
Deferred Inflows of Resources	-	295,000	-	295,000	295,000
Net Position:					
Unrestricted	585,948	2,752,702	474	2,753,176	3,339,124
Net investment in capital assets	(1,190,056)	7,106,638	3,317,726	10,424,364	9,234,308
Restricted program	2,000	3,250,980	-	3,250,980	3,252,980
Total net position	(602,108)	13,110,320	3,318,200	16,428,520	15,826,412
Total liabilities, deferred inflows of resources and net position	$ 22,154,106	$ 17,625,052	$ 3,318,200	$ 20,943,252	$ 43,097,358

The accompanying notes are an integral part of these combined general purpose statements.

EXCEL ACADEMY CHARTER SCHOOL,
FRIENDS OF EXCEL ACADEMY CHARTER SCHOOLS, INC.,
EXCEL ACADEMY EAST BOSTON REALTY CORPORATION AND
EXCEL ACADEMY BREMEN STREET REALTY CORPORATION

Combined Statement of Net Position
June 30, 2018

Assets	Enterprise Fund - Excel Academy Charter School	Component Units - Friends of Excel Academy Charter Schools, Inc.	Component Units - Excel Academy East Boston Realty Corporation	Component Units - Excel Academy Bremen Street Realty Corporation	Total Component Units	(Memorandum Only) Total
Current Assets:						
Cash and cash equivalents	$ 1,983,526	$ 2,866,086	$ 38,103	$ 12,763	$ 2,916,952	$ 4,900,478
Current portion of accounts and grants receivable	740,583	590,858	-	-	590,858	1,331,441
Current portion of due (to) from, net	(1,658,074)	1,805,936	(76,266)	(71,596)	1,658,074	-
Current portion of intercompany leases receivable (payable)	(1,260,636)	-	64,836	1,195,800	1,260,636	-
Current portion of intercompany notes receivable (payable)	541,424	-	-	(541,424)	(541,424)	-
Current portion of notes receivable	-	35,537	-	-	35,537	35,537
Prepaid expenses and other	326,102	-	-	37,050	37,050	363,152
Total current assets	672,925	5,298,417	26,673	632,593	5,957,683	6,630,608
Restricted Cash	971,628	234,620	23,485	-	258,105	1,229,733
Due (To) From, net of current portion	(964,578)	-	-	964,578	964,578	-
Intercompany Leases Receivable (Payable), net of current portion	(29,801,444)	-	8,498,033	21,303,411	29,801,444	-
Intercompany Notes Receivable (Payable), net of current portion	21,120,498	-	-	(21,120,498)	(21,120,498)	-
Notes Receivable, net of current portion	-	6,248,462	-	-	6,248,462	6,248,462
Grants Receivable, net of current portion and discount	-	419,313	-	-	419,313	419,313
Deposits	28,250	-	-	-	-	28,250
Capital Assets, net	30,095,211	-	-	2,208,803	2,208,803	32,304,014
Total assets	$ 22,122,490	$ 12,200,812	$ 8,548,191	$ 3,988,887	$ 24,737,890	$ 46,860,380
Liabilities, Deferred Inflows of Resources and Net Position						
Current Liabilities:						
Current portion of bonds payable	$ 438,014	$ 123,748	$ -	$ -	$ 123,748	$ 561,762
Current portion of notes payable	103,410	-	125,349	-	125,349	228,759
Accounts payable	603,136	-	-	-	-	603,136
Accounts payable - construction	-	-	-	488,528	488,528	488,528
Accrued interest payable	45,000	-	-	-	-	45,000
Accrued expenses	766,658	10,844	-	-	10,844	777,502
Total current liabilities	1,956,218	134,592	125,349	488,528	748,469	2,704,687
Long-term Liabilities:						
Accrued rent	166,974	-	-	-	-	166,974
Bonds payable, net of current portion	15,990,569	4,318,954	-	-	4,318,954	20,309,523
Notes payable, net of current portion	5,129,929	-	8,119,651	-	8,119,651	13,249,580
Total liabilities	23,243,690	4,453,546	8,245,000	488,528	13,187,074	36,430,764
Deferred Inflows of Resources	-	320,000	-	-	320,000	320,000
Net Position:						
Unrestricted	39,693	4,336,358	(38,163)	12,763	4,310,958	4,350,651
Net investment in capital assets	(1,173,648)	2,216,342	341,354	3,487,596	6,045,292	4,871,644
Restricted program	12,755	874,566	-	-	874,566	887,321
Total net position	(1,121,200)	7,427,266	303,191	3,500,359	11,230,816	10,109,616
Total liabilities, deferred inflows of resources and net position	$ 22,122,490	$ 12,200,812	$ 8,548,191	$ 3,988,887	$ 24,737,890	$ 46,860,380

The accompanying notes are an integral part of these combined general purpose statements.

EXCEL ACADEMY CHARTER SCHOOL,
FRIENDS OF EXCEL ACADEMY CHARTER SCHOOLS, INC.,
EXCEL ACADEMY EAST BOSTON REALTY CORPORATION AND
EXCEL ACADEMY BREMEN STREET REALTY CORPORATION

Combined Statement of Revenues, Expenses and Changes in Net Position
For the Year Ended June 30, 2019

		Component Units -						
		Friends of Excel Academy Charter Schools, Inc.						
	Enterprise Fund - Excel Academy Charter School	Unrestricted and Capital Asset Funds	Restricted Program Funds	Total	Excel Academy East Boston Realty Corporation	Excel Academy Bremen Street Realty Corporation	Total Component Units	(Memorandum Only) Total
Operating Revenue:								
Per-pupil tuition	$ 19,958,619	$ -	$ -	$ -	$ -	$ -	$ -	$ 19,958,619
In-kind pension	3,203,453	-	-	-	-	-	-	3,203,453
Grants - government	1,725,731	-	-	-	-	-	-	1,725,731
Program-specific grants and contributions - private	13,750	-	631,133	631,133	-	-	631,133	644,883
Program fees	337,700	-	-	-	-	-	-	337,700
In-kind transportation and other	134,627	8,127	-	8,127	-	-	8,127	142,754
Intercompany grants - program-specific	168,632	(168,632)	-	(168,632)	-	-	(168,632)	-
Transfer between funds	-	399,219	(399,219)	-	-	-	-	-
Total operating revenue	25,542,512	238,714	231,914	470,628	-	-	470,628	26,013,140
Operating Expenses:								
Personnel and related costs:								
Salaries	13,132,652	-	-	-	-	-	-	13,132,652
In-kind pension	3,203,453	-	-	-	-	-	-	3,203,453
Payroll taxes and fringe benefits	1,281,573	-	-	-	-	-	-	1,281,573
Staff development	101,044	-	-	-	-	-	-	101,044
Total personnel and related costs	17,718,722	-	-	-	-	-	-	17,718,722
Direct student costs:								
Food	554,940	-	-	-	-	-	-	554,940
School instructional program expenses	552,911	-	-	-	-	-	-	552,911
Technology	519,539	-	-	-	-	-	-	519,539
Student activities, including in-kind	493,355	-	-	-	-	-	-	493,355
Transportation, including in-kind	459,745	-	-	-	-	-	-	459,745
Program supplies	417,708	-	-	-	-	-	-	417,708
Consultants and service contractors	13,647	-	-	-	-	-	-	13,647
Total direct student costs	3,011,845	-	-	-	-	-	-	3,011,845
Occupancy:								
Interest expense	755,163	237,137	-	237,137	55,154	-	292,291	1,047,454
Repairs and maintenance	771,150	-	-	-	-	-	-	771,150
Rent and related costs	443,683	-	-	-	-	-	-	443,683
Utilities	218,327	-	-	-	-	-	-	218,327
Intercompany interest expense (revenue) - leases	690,697	(177,933)	-	(177,933)	(59,397)	(453,367)	(690,697)	-
Intercompany interest expense (revenue) - notes	(755,163)	-	-	-	-	755,163	755,163	-
Total occupancy	2,123,857	59,204	-	59,204	(4,243)	301,796	356,757	2,480,614
Other operating costs:								
Professional fees	437,029	261,126	-	261,126	6	2,605	263,737	700,766
Staff recruitment	232,192	-	-	-	-	-	-	232,192
Office supplies	160,618	-	-	-	-	-	-	160,618
Special event expense, including in-kind	-	145,693	-	145,693	-	-	145,693	145,693
Miscellaneous, including in-kind	3,381	63,399	-	63,399	-	37,049	100,448	103,829
Telephone	98,984	-	-	-	-	-	-	98,984
Marketing and development	85,296	-	-	-	-	-	-	85,296
Insurance	79,025	-	-	-	-	-	-	79,025
Travel	34,895	-	-	-	-	-	-	34,895
Dues and subscriptions	29,832	-	-	-	-	-	-	29,832
Scholarships	21,989	3,000	-	3,000	-	-	3,000	24,989
Bad debt	-	10,200	-	10,200	-	-	10,200	10,200
Total other operating costs	1,183,241	483,418	-	483,418	6	39,654	523,078	1,706,319
Depreciation	1,068,943	-	-	-	-	-	-	1,068,943
Total operating expenses	25,106,608	542,622	-	542,622	(4,237)	341,450	879,835	25,986,443
Changes in net position from operations	435,904	(303,908)	231,914	(71,994)	4,237	(341,450)	(409,207)	26,697
General Revenue (Expenses):								
Capital grants	-	-	2,529,500	2,529,500	-	-	2,529,500	2,529,500
Net gain (loss) on unwind	-	2,267,453	-	2,267,453	(307,452)	-	1,960,001	1,960,001
Grants and contributions - general	2,884	649,451	-	649,451	-	-	649,451	652,335
Interest and other income	-	255,471	-	255,471	24	9,291	264,786	264,786
Special event income	-	217,821	-	217,821	-	-	217,821	217,821
Miscellaneous	80,304	-	-	-	-	-	-	80,304
Financing fees	-	(14,648)	-	(14,648)	-	-	(14,648)	(14,648)
Intercompany grants - capital	-	(150,000)	-	(150,000)	-	150,000	-	-
Transfer between funds - capital	-	150,000	(150,000)	-	-	-	-	-
Transfer between funds - general	-	235,000	(235,000)	-	-	-	-	-
Total general revenue (expenses)	83,188	3,610,548	2,144,500	5,755,048	(307,428)	159,291	5,606,911	5,690,099
Changes in net position	519,092	3,306,640	2,376,414	5,683,054	(303,191)	(182,159)	5,197,704	5,716,796
Net Position:								
Beginning of year	(1,121,200)	6,552,700	874,566	7,427,266	303,191	3,500,359	11,230,816	10,109,616
End of year	$ (602,108)	$ 9,859,340	$ 3,250,980	$ 13,110,320	$ -	$ 3,318,200	$ 16,428,520	$ 15,826,412

The accompanying notes are an integral part of these combined general purpose statements.

EXCEL ACADEMY CHARTER SCHOOL,
FRIENDS OF EXCEL ACADEMY CHARTER SCHOOLS, INC.,
EXCEL ACADEMY EAST BOSTON REALTY CORPORATION AND
EXCEL ACADEMY BREMEN STREET REALTY CORPORATION

Combined Statement of Revenues, Expenses and Changes in Net Position
For the Year Ended June 30, 2018

		Component Units -						
		Friends of Excel Academy Charter Schools, Inc.						
	Enterprise Fund - Excel Academy Charter School	Unrestricted and Capital Asset Funds	Restricted Program Funds	Total	Excel Academy East Boston Realty Corporation	Excel Academy Bremen Street Realty Corporation	Total Component Units	(Memorandum Only) Total
Operating Revenue:								
Per-pupil tuition	$ 16,675,863	$ -	$ -	$ -	$ -	$ -	$ -	$ 16,675,863
In-kind pension	2,800,371	-	-	-	-	-	-	2,800,371
Grants - government	1,792,053	-	-	-	-	-	-	1,792,053
Program-specific grants and contributions - private	46,250	-	315,168	315,168	-	-	315,168	361,418
Program fees	363,442	-	-	-	-	-	-	363,442
In-kind transportation and other	121,578	-	-	-	-	-	-	121,578
Network support	200,000	(200,000)	-	(200,000)	-	-	(200,000)	-
Intercompany grants - program-specific	184,879	(184,879)	-	(184,879)	-	-	(184,879)	-
Transfer between funds	-	186,697	(186,697)	-	-	-	-	-
Total operating revenue	22,184,436	(198,182)	128,471	(69,711)	-	-	(69,711)	22,114,725
Operating Expenses:								
Personnel and related costs:								
Salaries	11,821,227	-	-	-	-	-	-	11,821,227
In-kind pension	2,800,371	-	-	-	-	-	-	2,800,371
Payroll taxes and fringe benefits	1,166,653	-	-	-	-	-	-	1,166,653
Staff development	97,650	-	-	-	-	-	-	97,650
Total personnel and related costs	15,885,901	-	-	-	-	-	-	15,885,901
Direct student costs:								
Food	582,386	-	-	-	-	-	-	582,386
School instructional program expenses	415,607	-	-	-	-	-	-	415,607
Technology	400,397	-	-	-	-	-	-	400,397
Student activities, including in-kind	423,089	-	-	-	-	-	-	423,089
Transportation, including in-kind	442,742	-	-	-	-	-	-	442,742
Program supplies	371,879	-	-	-	-	-	-	371,879
Consultants and service contractors	8,396	-	-	-	-	-	-	8,396
Total direct student costs	2,644,496	-	-	-	-	-	-	2,644,496
Occupancy:								
Interest expense	795,872	213,915	-	213,915	193,517	-	407,432	1,203,304
Repairs and maintenance	762,188	-	-	-	-	-	-	762,188
Rent and related costs	426,153	-	-	-	-	-	-	426,153
Utilities	193,926	-	-	-	-	-	-	193,926
Intercompany interest expense (revenue) - leases	1,024,210	-	-	-	(236,935)	(787,275)	(1,024,210)	-
Intercompany interest expense (revenue) - notes	(795,872)	-	-	-	-	795,872	795,872	-
Total occupancy	2,406,477	213,915	-	213,915	(43,418)	8,597	179,094	2,585,571
Other operating costs:								
Professional fees	469,125	2,378	-	2,378	23,200	6,010	31,588	500,713
Staff recruitment	185,436	-	-	-	-	-	-	185,436
Office supplies	136,204	-	-	-	-	-	-	136,204
Special event expense	-	140,777	-	140,777	-	-	140,777	140,777
Miscellaneous	4,981	35,915	-	35,915	-	-	35,915	40,896
Telephone	31,170	-	-	-	-	-	-	31,170
Marketing and development	49,847	-	-	-	-	-	-	49,847
Insurance	61,693	-	-	-	-	-	-	61,693
Travel	20,873	-	-	-	-	-	-	20,873
Dues and subscriptions	35,027	-	-	-	-	-	-	35,027
Scholarships	1,500	3,000	-	3,000	-	-	3,000	4,500
Total other operating costs	995,856	182,070	-	182,070	23,200	6,010	211,280	1,207,136
Depreciation	954,055	-	-	-	-	-	-	954,055
Total operating expenses	22,886,785	395,985	-	395,985	(20,218)	14,607	390,374	23,277,159
Changes in net position from operations	(702,349)	(594,167)	128,471	(465,696)	20,218	(14,607)	(460,085)	(1,162,434)
General Revenue (Expenses):								
Grants and contributions - general	5,500	1,353,083	-	1,353,083	-	-	1,353,083	1,358,583
Interest and other income	-	352,380	-	352,380	167	-	352,547	352,547
Miscellaneous	43,986	-	-	-	-	-	-	43,986
Intercompany grants - capital	12,500	(493,120)	-	(493,120)	-	480,620	(12,500)	-
Transfer between funds - capital	-	250,000	(250,000)	-	-	-	-	-
Transfer between funds - general	-	325,500	(325,500)	-	-	-	-	-
Intercompany grants - general	675,000	(675,000)	-	(675,000)	-	-	(675,000)	-
Total general revenue (expenses)	736,986	1,112,843	(575,500)	537,343	167	480,620	1,018,130	1,755,116
Changes in net position	34,637	518,676	(447,029)	71,647	20,385	466,013	558,045	592,682
Net Position:								
Beginning of year	(1,155,837)	6,034,024	1,321,595	7,355,619	282,806	3,034,346	10,672,771	9,516,934
End of year	$ (1,121,200)	$ 6,552,700	$ 874,566	$ 7,427,266	$ 303,191	$ 3,500,359	$ 11,230,816	$ 10,109,616

The accompanying notes are an integral part of these combined general purpose statements.

EXCEL ACADEMY CHARTER SCHOOL,
FRIENDS OF EXCEL ACADEMY CHARTER SCHOOLS, INC.,
EXCEL ACADEMY EAST BOSTON REALTY CORPORATION AND
EXCEL ACADEMY BREMEN STREET REALTY CORPORATION

Combined Statement of Cash Flows
For the Year Ended June 30, 2019

	Enterprise Fund - Excel Academy Charter School	Component Units - Friends of Excel Academy Charter Schools, Inc.	Component Units - Excel Academy East Boston Realty Corporation	Component Units - Excel Academy Bremen Street Realty Corporation	Component Units - Total Component Units	(Memorandum Only) Total
Cash Flows from Operating Activities:						
Receipts for tuition	$ 18,379,592	$ -	$ -	$ -	$ -	$ 18,379,592
Receipts from grants - government	1,698,143	-	-	-	-	1,698,143
Receipts from donors	498,060	1,636,256	-	-	1,636,256	2,134,316
Receipts from other sources	164,559	433,404	59,421	2,552	495,377	659,936
Payments for interest	(740,163)	(237,137)	(55,154)	-	(292,291)	(1,032,454)
Employee compensation and payroll taxes	(14,388,130)	-	-	-	-	(14,388,130)
Payments for supplies and services	(6,573,458)	(621,840)	(59,708)	(14,841)	(696,389)	(7,269,847)
Net cash provided by (used in) operating activities	(961,397)	1,210,683	(55,441)	(12,289)	1,142,953	181,556
Cash Flows from Investing Activities:						
Advances repaid by related party	-	676,442	-	-	676,442	676,442
Advances made to related party for construction in process	-	(1,119,540)	-	-	(1,119,540)	(1,119,540)
Acquisitions of capital assets and construction in process	(160,475)	(355,531)	-	-	(355,531)	(516,006)
Withdrawals from (deposits to) restricted cash, net	(10,989)	(881,023)	23,485	-	(857,538)	(868,527)
Net cash provided by (used in) investing activities	(171,464)	(1,679,652)	23,485	-	(1,656,167)	(1,827,631)
Cash Flows from Financing Activities:						
Capital grants received	-	1,029,500	-	-	1,029,500	1,029,500
Cash paid for put option	-	(1,000)	-	-	(1,000)	(1,000)
Accrued interest on capital lease (capital lease addition)	12,337	(6,190)	(6,147)	-	(12,337)	-
Principal payments (receipts) on capital lease	(77,173)	77,173	-	-	77,173	-
Principal payments for bonds payable	(438,267)	(376,906)	-	-	(376,906)	(815,173)
Principal payments for notes payable	(103,410)	-	-	-	-	(103,410)
Net cash provided by (used in) financing activities	(606,513)	722,577	(6,147)	-	716,430	109,917
Net Change in Cash and Cash Equivalents	(1,739,374)	253,608	(38,103)	(12,289)	203,216	(1,536,158)
Cash and Cash Equivalents:						
Beginning of year	1,983,526	2,866,086	38,103	12,763	2,916,952	4,900,478
End of year	$ 244,152	$ 3,119,694	$ -	$ 474	$ 3,120,168	$ 3,364,320
Cash Flows from Operating Activities:						
Changes in net position	$ 519,092	$ 5,683,054	$ (303,191)	$ (182,159)	$ 5,197,704	$ 5,716,796
Adjustments to reconcile changes in net position to net cash provided by (used in) operating activities:						
Depreciation	1,068,943	-	-	-	-	1,068,943
Capital grants	-	(2,529,500)	-	(150,000)	(2,679,500)	(2,679,500)
Change in discount on grants receivable	-	1,116	-	-	1,116	1,116
Bad debt	-	10,200	-	-	10,200	10,200
Net (gain) loss on unwind	-	(2,267,453)	307,452	-	(1,960,001)	(1,960,001)
Changes in operating assets and liabilities:						
Tuition receivable	(1,579,027)	-	-	-	-	(1,579,027)
Accounts and grants receivable	(271,033)	143,408	-	-	143,408	(127,625)
Due (to) from	(939,734)	190,174	(59,702)	282,820	413,292	(526,442)
Prepaid expenses and other	186,161	(12,288)	-	37,050	24,762	210,923
Accounts payable	(92,792)	25,316	-	-	25,316	(67,476)
Accrued interest payable	15,000	-	-	-	-	15,000
Accrued expenses	121,083	(8,344)	-	-	(8,344)	112,739
Accrued rent	10,910	-	-	-	-	10,910
Deferred inflows of resources	-	(25,000)	-	-	(25,000)	(25,000)
Net cash provided by (used in) operating activities	$ (961,397)	$ 1,210,683	$ (55,441)	$ (12,289)	$ 1,142,953	$ 181,556
Supplemental Disclosure of Transactions:						
Capital assets financed through accounts payable - construction	$ -	$ 126,120	$ -	$ -	$ 126,120	$ 126,120
Forgiveness of intercompany due to/from	$ -	$ (16,564)	$ 16,564	$ -	$ -	$ -
Assignment of capital lease included in net gain (loss) on unwind	$ -	$ 8,569,016	$ (8,569,016)	$ -	$ -	$ -
Satisfaction of notes included in net gain (loss) on unwind	$ -	$ (8,245,000)	$ 8,245,000	$ -	$ -	$ -
Construction in progress transferred in (out)	$ 2,839,815	$ -	$ -	$ (2,839,815)	$ (2,839,815)	$ -
Construction in progress paid by the Foundation for BSRC through due to (from)	$ -	$ (631,012)	$ -	$ 631,012	$ -	$ -

The accompanying notes are an integral part of these combined general purpose statements.

EXCEL ACADEMY CHARTER SCHOOL,
FRIENDS OF EXCEL ACADEMY CHARTER SCHOOLS, INC.,
EXCEL ACADEMY EAST BOSTON REALTY CORPORATION AND
EXCEL ACADEMY BREMEN STREET REALTY CORPORATION

Combined Statement of Cash Flows
For the Year Ended June 30, 2018

	Enterprise Fund - Excel Academy Charter School	Component Units - Friends of Excel Academy Charter Schools, Inc.	Component Units - Excel Academy East Boston Realty Corporation	Component Units - Excel Academy Bremen Street Realty Corporation	Component Units - Total Component Units	(Memorandum Only) Total
Cash Flows from Operating Activities:						
Receipts for tuition	$ 16,675,863	$ -	$ -	$ -	$ -	$ 16,675,863
Receipts from grants - government	1,746,389	-	-	-	-	1,746,389
Receipts from donors	958,346	1,995,858	-	-	1,995,858	2,954,204
Receipts from other sources	571,230	352,380	237,102	540,416	1,129,898	1,701,128
Payments for interest	(824,872)	(234,467)	(193,517)	-	(427,984)	(1,252,856)
Employee compensation and payroll taxes	(12,801,199)	-	-	-	-	(12,801,199)
Payments for supplies and services	(4,934,187)	(2,188,465)	(66,311)	(224,604)	(2,479,380)	(7,413,567)
Net cash provided by (used in) operating activities	1,391,570	(74,694)	(22,726)	315,812	218,392	1,609,962
Cash Flows from Investing Activities:						
Acquisitions of capital assets and construction in process	(275,323)	-	-	(1,688,310)	(1,688,310)	(1,963,633)
Withdrawals from (deposit to) restricted cash, net	(3,148)	149,771	62,333	1,118,407	1,330,511	1,327,363
Net cash provided by (used in) investing activities	(278,471)	149,771	62,333	(569,903)	(357,799)	(636,270)
Cash Flows from Financing Activities:						
Capital grants received	12,500	-	-	230,620	230,620	243,120
Accrued interest on capital lease (capital lease addition)	52,935	-	(52,935)	-	(52,935)	-
Principal payments for bonds payable	(71,417)	(138,637)	-	-	(138,637)	(210,054)
Principal payments for notes payable	(766,661)	-	-	-	-	(766,661)
Net cash provided by (used in) financing activities	(772,643)	(138,637)	(52,935)	230,620	39,048	(733,595)
Net Change in Cash and Cash Equivalents	340,456	(63,560)	(13,328)	(23,471)	(100,359)	240,097
Cash and Cash Equivalents:						
Beginning of year	1,643,070	2,929,646	51,431	36,234	3,017,311	4,660,381
End of year	$ 1,983,526	$ 2,866,086	$ 38,103	$ 12,763	$ 2,916,952	$ 4,900,478
Cash Flows from Operating Activities:						
Changes in net position	$ 34,637	$ 71,647	$ 20,385	$ 466,013	$ 558,045	$ 592,682
Adjustments to reconcile changes in net position to net cash provided by (used in) operating activities:						
Depreciation	954,055	-	-	-	-	954,055
Capital grants	(12,500)	-	-	(480,620)	(480,620)	(493,120)
Change in discount on grant receivable	-	(368)	-	-	(368)	(368)
Changes in operating assets and liabilities:						
Accounts and grants receivable	(91,862)	366,975	-	-	366,975	275,113
Due (to) from	423,947	(463,956)	(43,111)	333,120	(173,947)	250,000
Prepaid expenses and other	(126,202)	-	-	-	-	(126,202)
Accounts payable and accrued expenses	222,586	10,560	-	(2,701)	7,859	230,445
Accrued interest payable	(29,000)	(20,552)	-	-	(20,552)	(49,552)
Accrued rent	15,909	-	-	-	-	15,909
Deferred inflows of resources	-	(39,000)	-	-	(39,000)	(39,000)
Net cash provided by (used in) operating activities	$ 1,391,570	$ (74,694)	$ (22,726)	$ 315,812	$ 218,392	$ 1,609,962
Supplemental Disclosure of Non-Cash Transactions:						
Capital assets financed through accounts payable - construction	$ -	$ -	$ -	$ 488,528	$ 488,528	$ 488,528

The accompanying notes are an integral part of these combined general purpose statements.

1. OPERATIONS AND TAX STATUS

On February 24, 2003, Excel Academy Charter School (the School) was granted a charter by the Commonwealth of Massachusetts (the Commonwealth) under Chapter 71, Section 89 of the General Laws of Massachusetts. The School's charter is subject to renewal every five years by the Massachusetts Department of Elementary and Secondary Education (DESE). The School's current charter expires on June 30, 2023. In February 2019, DESE approved a charter amendment for a maximum enrollment increase from 1,344 to 1,400 students. The School's mission is to prepare students to succeed in high school and college, to apply their learning in solving relevant problems, and to engage productively in their community.

The School operates four campuses serving students in grades five through twelve in the communities of Boston and Chelsea, Massachusetts. During fiscal year 2019, the School served 1,295 students in grades five through twelve. During fiscal year 2018, the School served 1,126 students in grades five through eleven.

As a state chartered organization, the School is not subject to Federal or state income taxes. Donors may deduct contributions made to the School within Internal Revenue Code (IRC) regulations.

Friends of Excel Academy Charter Schools, Inc., a Massachusetts corporation, not for profit (the Foundation), was established to raise funds and support the functions of the School.

Excel Academy East Boston Realty Corporation (EBRC) was a Massachusetts corporation, not for profit, which was established for the purpose of acquiring, rehabilitating and operating a property in East Boston, Massachusetts (the East Boston Property). EBRC operated the East Boston Property in a manner to enable EBRC to qualify as a qualified active low-income community business for the purpose of New Markets Tax Credits, as defined in Section 45D of the IRC (see Note 11). In October 2018, EBRC authorized a transfer of the deed of the East Boston Property to the Foundation (see Note 11). EBRC dissolved in fiscal year 2019.

Excel Academy Bremen Street Realty Corporation (BSRC) is a Massachusetts corporation, not for profit, which was established for the purpose of acquiring, building, and operating property for a high school in East Boston, Massachusetts (the High School Property).

The Foundation, EBRC and BSRC are considered component units of the School under Governmental Accounting Standards Board (GASB) Statement No. 34 (see page 13), as they exist to support the School.

The Foundation, EBRC (until dissolution) and BSRC are exempt from Federal income taxes as organizations (not private foundations) formed for charitable purposes under Section 501(c)(3) of the IRC and are also exempt from state income taxes. Contributions made to the Foundation, EBRC (until dissolution) and BSRC are deductible within the requirements of the IRC. EBRC (until dissolution) and BSRC are classified under IRC Code 509(a)(3) as Type II and Type III supporting organizations, respectively, as they are organized and operated to support the Foundation.

The School, the Foundation, EBRC and BSRC, collectively referred to as the Organization, are governed by separate Boards of Trustees.

2. SIGNIFICANT ACCOUNTING POLICIES

Basis of Presentation - GASB Standards

The accompanying combined general purpose financial statements were prepared on the accrual basis of accounting. Because the School is a quasi-public organization, the accounting policies and combined financial statement presentation are governed by standards issued by GASB. The School has adopted GASB Statement No. 34, *Basic Financial Statements and Management's Discussion and Analysis for State and Local Governments*. GASB Statement No. 34 outlines financial reporting requirements for state and local governments. The School is considered a special purpose government organization that conducts only business-type activities within the meaning of GASB Statement No. 34.

Consistent with the provisions of GASB Statement Nos. 14 and 39, as clarified by GASB Statement No. 61, *The Financial Reporting Entity: "Omnibus" an amendment to GASB Statement Nos. 14 and 39*, the Foundation, EBRC and BSRC are presented in these combined general purpose financial statements as component units of the School. The "memorandum only total" is presented in accordance with GASB Statement No. 14. This represents the combined totals of the School, the Foundation, EBRC and BSRC without the eliminations of inter-company balances and transactions.

Basis of Accounting

The accrual basis of accounting is used for all governmental entities that operate as business-type entities. Accordingly, revenue is recognized when earned and capital assets and expenditures are recorded when incurred. Grants and contributions are recognized when all eligible requirements are met.

Pursuant to GASB Statement No. 62, *Codification of Accounting and Financial Reporting Guidance Contained in Pre-November 30, 1989 FASB and AICPA Pronouncements*, the Organization has elected to apply the provisions of all relevant pronouncements of Financial Accounting Standards Board (FASB) that do not conflict with or contradict GASB pronouncements.

Classification of Net Position

Unrestricted represents the portion of expendable funds that are used to support operations, including funds for which donor-imposed restrictions have been met in accordance with funding agreements.

Net Investment in Capital Assets represent the net book value of capital assets and construction in process as well as other assets related to capital, net of related debt.

Restricted Program includes all funds received or committed to fund specific programs which have not yet been expended. These funds were restricted for the following at June 30:

	2019	2018
Capital restricted	$ 2,529,500	$ 150,000
Program restricted	723,480	737,321
	$ 3,252,980	$ 887,321

2. **SIGNIFICANT ACCOUNTING POLICIES** (Continued)

Deferred Inflows of Resources

Deferred inflows of resources represent all funds committed for specific future time periods which have not yet been expended in accordance with GASB No. 63, *Financial Reporting of Deferred Outflows of Resources, Deferred Inflows of Resources, and Net Position*. These amounts will be recognized as revenue in the time periods for which they are intended.

Revenue Recognition

Per-pupil tuition and grant revenue are recorded as services are provided and costs are incurred. The Commonwealth of Massachusetts, Executive Office of Administration and Finance, calculates per-pupil tuition reimbursement which is paid to the School by DESE.

The Organization records unrestricted contributions when they are received or unconditionally committed. Gifts of cash and other assets are recorded as restricted program funds, if they are received with donor stipulations that limit the use of the donated assets. When a stipulated purpose restriction is accomplished, donor restricted net position is reported in the combined statements of revenues, expenses and changes in net position as transfers between funds. Program fees and all other income are recorded when earned.

Capital Assets and Depreciation

Capital assets (see Note 7) are recorded at cost, if purchased, or fair value at the time of donation. The Organization capitalizes assets with a cost over $5,000 and an estimated useful life of greater than one year. Renewals and betterments are capitalized, while repairs and maintenance are expensed as they are incurred. Depreciation is computed using the straight-line method over the following estimated useful lives:

Buildings and building improvements	40 years
Leasehold improvements	Shorter of 20 years or life of lease
Computers and software	3 years
Furniture and equipment	5 - 7 years

Land is not depreciated.

The School purchases classroom supplies including textbooks, literature and other materials to carry on educational activities. These purchases are expensed in the year of acquisition.

Marketing and Advertising Costs

Costs related to marketing and advertising are expensed in the period incurred. Advertising expense was $64,542 and $20,976 for the years ended June 30, 2019 and 2018, respectively, and is included in marketing and development expense in the accompanying combined statements of revenues, expenses and changes in net position.

Financing Costs

In accordance with GASB Statement No. 65, *Items Previously Reported as Assets and Liabilities*, the Organization expenses all financing costs in the period incurred. There was $14,648 of financing costs incurred in fiscal year 2019. There were no financing costs in fiscal year 2018.

2. **SIGNIFICANT ACCOUNTING POLICIES** (Continued)

Cash and Cash Equivalents

For the purposes of the combined statements of cash flows, cash and cash equivalents consist of unrestricted checking, savings, and money market accounts, excluding restricted cash (see below and Note 16).

Restricted Cash

Restricted cash (see Note 16) consists of project funds for the payment and reimbursements of project costs and restricted reserves as required by certain debt instruments, cash restricted for construction, and cash gifts restricted for capital purposes.

Estimates

The preparation of combined general purpose financial statements in accordance with accounting principles generally accepted in the United States of America requires management to make estimates and assumptions that may affect the reported amounts of assets and liabilities and the disclosure of contingent assets and liabilities as of the date of the combined general purpose financial statements and the reported amounts of revenues and expenses during the reporting periods. Actual results could differ from these estimates.

Allowance for Doubtful Accounts

The Organization records an allowance for doubtful accounts on receivable balances that management believes may not be collectable. The allowance is based on past experience with the donor or funder and current economic trends. No allowance for doubtful accounts was deemed necessary at June 30, 2019 or 2018.

In-Kind Pension, Transportation and Other

During fiscal years 2019 and 2018, the School recorded in-kind pension revenue and expenses related to its proportionate share of the Massachusetts Teachers' Retirement System's (MTRS) pension expense (see Note 5).

The School received donated transportation from the City of Boston for certain students, as required by DESE. The value of these services, as estimated by management and the City of Boston, was $133,336 and $120,732 for the years ended June 30, 2019 and 2018, respectively, and is included in in-kind transportation and other revenue and transportation expense in the accompanying combined general purpose financial statements.

The Organization also received in-kind donations for student activities, special event, and other in fiscal years 2019 and 2018. The value of these donations, as estimated by management, was $9,418 and $846, respectively, and is included in in-kind transportation and other revenue and the following expense accounts: student activities, special event, and miscellaneous in the accompanying combined general purpose financial statements.

The Organization also received an in-kind donation of equipment in fiscal year 2018. The value of this donation, as estimated by management, was $12,500 and is included in interest and other income, intercompany grants - capital, and capital assets in the accompanying combined general purpose financial statements.

2. **SIGNIFICANT ACCOUNTING POLICIES** (Continued)

In-Kind Pension, Transportation and Other (Continued)

The Organization receives other donated services from a variety of volunteers. No amounts have been recognized in the accompanying combined general purpose financial statements, since these services do not meet the criteria for recording in accordance with accounting principles generally accepted in the United States of America.

Fair Value of Financial Instruments

The Organization follows the accounting and disclosure standards pertaining to GASB 72, *Fair Value Measurement and Application*, for qualifying assets and liabilities. Fair value is defined as the price that the Organization would receive upon selling an asset or pay to settle a liability in an orderly transaction between market participants at the measurement date.

The Organization uses a framework for measuring fair value that includes a hierarchy that categorizes and prioritizes the sources used to measure and disclose fair value. This hierarchy is broken down into three levels based on inputs that market participants would use in valuing the financial instruments based on market data obtained from sources independent of the Organization. Inputs refer broadly to the assumptions that market participants would use in pricing the financial instrument, including assumptions about risk. Inputs may be observable or unobservable. Observable inputs are inputs that are developed using market data, such as publicly available information about actual events or transactions, and which reflect the assumptions that market participants would use when pricing an asset or liability. Unobservable inputs are inputs for which market data are not available and that are developed using the best information available about the assumptions that market participants would use when pricing an asset or liability.

The three-tier hierarchy of inputs is summarized in the three broad levels as follows:

Level 1 - Inputs that reflect unadjusted quoted prices in active markets for identical assets at the measurement date.

Level 2 - Inputs other than quoted prices that are observable for the asset either directly or indirectly, including inputs in markets that are not considered to be active.

Level 3 - Inputs that are unobservable and which require significant judgment or estimation.

An asset or liability's level within the framework is based upon the lowest level of any input that is significant to the fair value measurement.

Subsequent Events

Subsequent events have been evaluated through October 16, 2019, which is the date the combined general purpose financial statements were available to be issued. There were no events that met the criteria for recognition or disclosure in the combined general purpose financial statements.

2. SIGNIFICANT ACCOUNTING POLICIES (Continued)

Income Taxes

The Foundation, EBRC and BSRC account for uncertainty in income taxes in accordance with Accounting Standards Codification (ASC) Topic, *Income Taxes*. This standard clarifies the accounting for uncertainty in tax positions and prescribes a recognition threshold and measurement attribute for the combined general purpose financial statements regarding a tax position taken or expected to be taken in a tax return. The Foundation, EBRC and BSRC have determined that there are no uncertain tax positions which qualify for either recognition or disclosure in the combined general purpose financial statements at June 30, 2019 and 2018. However, the informational returns for the Foundation, EBRC and BSRC are subject to examination by the appropriate jurisdictions. Upon dissolution, EBRC filed its final tax filings in April 2019.

3. FUNDING

The School receives significant funding from DESE for tuition revenue and grant support. This funding is subject to audit by the appropriate governmental agency. In the opinion of management, the results of such audits, if any, will not have a material effect on the net position of the School as of June 30, 2019 and 2018, or on the changes in net position for the years then ended. The School received approximately 97% and 95% of its operating revenue from the Commonwealth for the years ended June 30, 2019 and 2018, respectively.

4. LEASE AGREEMENTS

In September 2011, the School and EBRC entered into a lease agreement for the East Boston Property. In October 2018, EBRC assigned this lease to the Foundation (see Note 11). The lease is for forty years with rent being due monthly as defined in the agreement. The School is responsible for certain operating costs as defined in the agreement. The lease has qualified as a capital lease under the lease accounting standard of U.S. Generally Accepted Accounting Principles (U.S. GAAP). Accordingly, the final cost of the East Boston Property was capitalized and recorded as a capital asset of the School. The School and EBRC/the Foundation also recorded a lease liability and a lease receivable, respectively, which are included in intercompany leases receivable (payable) in the accompanying combined statements of net position. Under this agreement, interest has been imputed at 2.8%. Interest under this agreement was $237,330 and $236,935 for the years ended June 30, 2019 and 2018, respectively, and is included in intercompany interest expense (revenue) - leases in the accompanying combined statements of revenues, expenses and changes in net position. The outstanding intercompany lease receivable (payable) at June 30, 2019 and 2018, was $8,498,033 and $8,562,869, respectively.

The School leases a building for the Orient Heights school campus under a lease that originally expired on August 31, 2018, and required monthly lease payments of $11,769. During fiscal year 2018, the lease was renewed for one year, requiring monthly lease payments of $13,333 through August 2019. During fiscal year 2019, the lease was renewed again, requiring monthly lease payments of $14,000 through December 2020. The School has the right to terminate the lease on or after August 31, 2020, subject to an early termination fee of $28,000. The School is responsible for real estate tax assessments and certain operating costs. Rent paid for each of the years ended June 30, 2019 and 2018, was $156,872 and $141,232, respectively, and is included in rent and related costs in the accompanying combined general purpose financial statements. The School is also responsible for its proportional share of real estate taxes and operating expenses, which totaled approximately $80,000 in each of the fiscal years 2019 and 2018. The Foundation has guaranteed this lease.

4. LEASE AGREEMENTS (Continued)

The School leases a building for the Chelsea school campus that expires in July 2031. The School is required to pay monthly rent of $16,357 starting in August 2016, which increases in future years. The School paid $205,682 and $200,684 for rent for the years ended June 30, 2019 and 2018, respectively. In accordance with GASB No. 13, *Accounting for Operating Leases with Scheduled Rental Increases*, rent expense on this lease is calculated using the straight-line method over the term of the lease and is $216,592 annually. Rent expense is included in rent and related costs in the accompanying combined statements of revenues, expenses and changes in net position. Accrued rent was $177,884 and $166,974 at June 30, 2019 and 2018, respectively. The School is also responsible for its proportional share of real estate taxes and operating expenses, which totaled approximately $91,000 and $67,000 for fiscal years 2019 and 2018, respectively. The Foundation has guaranteed this lease.

The School leases the High School property from BSRC. The lease commenced on August 1, 2016, following the completion of the High School Property (see Note 1) and expires on June 30, 2056. During fiscal year 2019, additional space was added to the lease upon completion of a construction project by BSRC. The total cost of $2,839,815 was added to the lease. Rent is due monthly as defined in the agreement. The School is responsible for certain operating costs as defined in the agreement. The lease has qualified as a capital lease under the lease accounting standard of U.S. GAAP. Accordingly, the final cost of the High School Property was capitalized and recorded as a capital asset of the School. The School and BSRC also recorded a lease liability and a lease receivable, respectively, which are included in intercompany leases receivable (payable) in the accompanying combined statements of net position. Under this agreement, interest has been imputed at 1.9%. Interest under this agreement was $453,367 and $787,275 for the years ended June 30, 2019 and 2018, respectively, and is included in intercompany interest expense (revenue) - leases in the accompanying combined statements of revenues, expenses and changes in net position. The outstanding intercompany lease receivable (payable) at June 30, 2019 and 2018, was $24,797,349 and $22,499,211, respectively.

Future minimum cash payments under these leases are as follows:

		Capital Leases		
	Operating	Capital Lease Payments	Amounts Representing Interest	Decrease in Principal Balances
2020	$ 376,951	$ 2,635,912	$ 671,452	$ 1,964,460
2021	$ 305,424	$ 1,680,718	$ 651,037	$ 1,029,681
2022	$ 222,400	$ 1,676,417	$ 630,187	$ 1,046,230
2023	$ 234,867	$ 3,290,149	$ 595,070	$ 2,695,079
2024	$ 236,000	$ 1,676,549	$ 556,622	$ 1,119,927
2025 – 2029	$ 1,180,000	$ 9,953,477	$ 2,234,060	$ 7,719,417
2030 – 2034	$ 491,667	$ 12,997,228	$ 976,845	$ 12,020,383
2035 – 2039	$ -	$ 1,978,516	$ 701,696	$ 1,276,820
2040 – 2044	$ -	$ 1,980,791	$ 512,565	$ 1,468,226
2045 – 2049	$ -	$ 1,983,303	$ 295,171	$ 1,688,132
2050 – 2054	$ -	$ 1,315,205	$ 60,544	$ 1,254,661
2055 – 2056	$ -	$ 12,609	$ 243	$ 12,366

During fiscal years 2019 and 2018, $12,337 and $52,935, respectively, of excess interest was added back to the intercompany lease receivable (payable) for the East Boston Property.

5. RETIREMENT PLANS

The School's teaching staff and certain administrators participate individually in MTRS. MTRS is managed by the Commonwealth. The School is not legally required to contribute to MTRS. All full-time teaching staff and administrators are covered by and must participate in MTRS. These qualified employees and the School are exempt from Federal social security taxes. Benefits vest fully after ten years of full-time employment. An employee may receive retirement benefits after twenty years of service or ten years of service having attained the age of 55. Covered employees are required by state statute to contribute 5% to 11% of their salaries, depending on their date of hire, and an additional 2% of their salary in excess of $30,000 to the plan. The School follows GASB Statement No. 68 (GASB 68), *Accounting and Financial Reporting for Pensions, an Amendment of GASB Statement No. 27* (GASB 27), which requires the School to recognize its proportionate share of pension expense and in-kind revenue, "on behalf of payments", related to MTRS, as reported by the Commonwealth. In accordance with GASB 68, the School's arrangement meets the definition of a special funding situation, whereby the School does not contribute to MTRS and the Commonwealth is required to make actuarially determined contributions to maintain the financial integrity of the retirement system.

The School's proportionate share of MTRS pension expense, as calculated under GASB 68, was $3,203,453 and $2,800,371 for the years ended June 30, 2019 and 2018, respectively, which is reflected as in-kind pension revenue and in-kind pension expense in the accompanying combined statements of revenues, expenses and changes in net position. The School's proportionate share of MTRS's net pension liability was $31,612,340 and $26,830,441 at the measurement date selected by the Commonwealth of June 30, 2018 and 2017, respectively. In accordance with the special funding situation under GASB 68, this amount has not been recorded in the accompanying combined general purpose financial statements.

In accordance with certain contract requirements, the School was required to make payments of $63,153 and $70,866 to MTRS for the years ended June 30, 2019 and 2018, respectively, which are included in payroll taxes and fringe benefits in the accompanying combined statements of revenues, expenses and changes in net position.

The School also has a defined contribution pension plan pursuant to IRC Section 403(b), which covers all employees. The School did not make any contributions to the plan during fiscal years 2019 and 2018.

6. CONCENTRATIONS

The Organization maintains cash balances in banks located in Boston, Massachusetts. The Federal Deposit Insurance Corporation (FDIC) insures balances at each bank up to specified limits. At certain times during the year, the cash balances exceeded the FDIC's insured limit. The Organization has not experienced any losses in such accounts. The Organization believes it is not exposed to any significant credit risk on cash and cash equivalents.

As required by GASB Statement No. 40, *Deposits and Investment Risk Disclosure*, the following represents a summary of deposits at June 30:

2019	School	Foundation	EBRC	BSRC
Fully insured	$ 250,201	$ 250,000	$ -	$ 474
Uninsured	976,568	3,985,337	-	-
	$ 1,226,769	$ 4,235,337	$ -	$ 474

6. **CONCENTRATIONS** (Continued)

2018	School	Foundation	EBRC	BSRC
Fully insured	$ 266,920	$ 250,000	$ 61,588	$ 12,763
Uninsured	2,688,234	2,850,706	-	-
	$ 2,955,154	$ 3,100,706	$ 61,588	$ 12,763

7. **CAPITAL ASSETS AND CONSTRUCTION IN PROCESS**

Changes in capital assets are as follows for the School:

	Balance June 30, 2018	2019 Additions	2019 Transfers	2019 Disposals	Balance June 30, 2019
Cost:					
Land	$ 3,246,716	$ -	$ -	$ -	$ 3,246,716
Buildings and building improvements	27,320,645	-	2,750,709	-	30,071,354
Leasehold improvements	1,031,007	36,582	-	(11,254)	1,056,335
Computers and software	80,372	-	-	-	80,372
Furniture and equipment	1,029,396	123,893	89,106	(13,400)	1,228,995
Total cost	32,708,136	160,475	2,839,815	(24,654)	35,683,772
Less - accumulated depreciation	2,612,925	1,068,943	-	(24,654)	3,657,214
Capital assets, net	$ 30,095,211	$ (908,468)	$ 2,839,815	$ -	$ 32,026,558

	Balance June 30, 2017	2018 Additions	2018 Disposals	Balance June 30, 2018
Cost:				
Land	$ 3,246,716	$ -	$ -	$ 3,246,716
Buildings and building improvements	27,320,645	-	-	27,320,645
Leasehold improvements	901,735	150,552	(21,280)	1,031,007
Computers and software	386,803	-	(306,431)	80,372
Furniture and equipment	974,306	124,771	(69,681)	1,029,396
Total cost	32,830,205	275,323	(397,392)	32,708,136
Less - accumulated depreciation	2,056,262	954,055	(397,392)	2,612,925
Capital assets, net	$ 30,773,943	$ (678,732)	$ -	$ 30,095,211

7. CAPITAL ASSETS AND CONSTRUCTION IN PROCESS (Continued)

Changes in capital assets for BSRC are as follows:

	Balance June 30, 2018	2019 Additions	2019 Transfers	Balance June 30, 2019
Capital assets:				
Construction in process	$ 2,208,803	$ 631,012	$ (2,839,815)	$ -

	Balance June 30, 2017	2018 Additions	2018 Disposals	Balance June 30, 2018
Capital assets:				
Construction in process	$ 108,639	$ 2,100,164	$ -	$ 2,208,803

Changes in capital assets for the Foundation are as follows:

	Balance June 30, 2018	2019 Additions	2019 Disposals	Balance June 30, 2019
Capital assets:				
Construction in process	$ -	$ 481,651	$ -	$ 481,651

Construction in process at June 30, 2019, consists of costs incurred by the Foundation in connection with a new proposed middle school building constructed over the parking lot of the High School Property. The building is expected to cost approximately $11.6 million and be completed in August 2020. The Foundation expects to fund this building through new debt of approximately $12 million, which will also be used to repay the outstanding approximately $3.6 million on the LISC note payable for the High School Property (see Note 13), and private contributions and Foundation net assets of approximately$3.25 million. These costs will not be depreciated until the building is completed. The Foundation expects to enter into these new debt agreements and repay the LISC note payable in fiscal year 2020.

Construction in process at June 30, 2018, consisted of construction costs incurred by BSRC in connection with an expansion of the High School Property (see Note 1). The expansion costs were not depreciated until the expansion was completed in August 2018 and the building was transferred under the capital lease agreement (see Note 4) to the School. The total cost of the project was approximately $2,800,000.

8. TUITION, ACCOUNTS AND GRANTS RECEIVABLE

Approximately 92% and 91% of accounts and grants receivable for the School are due from the Commonwealth as of June 30, 2019 and 2018, respectively. All of the tuition receivable is due from the Commonwealth at June 30, 2019, and was collected in fiscal year 2020. The Foundation's accounts and grants receivable are due from individuals and foundations.

8. TUITION, ACCOUNTS AND GRANTS RECEIVABLE (Continued)

Accounts and grants receivable are expected to be received as follows at June 30:

	2019	2018
Due within one year	$ 2,360,866	$ 1,331,441
Due within two years	925,000	187,000
Due within three years	100,000	150,000
Due within four years	-	100,000
	3,385,866	1,768,441
Less - discount	18,803	17,687
Less - current portion	2,360,866	1,331,441
Non-current grants receivable	$ 1,006,197	$ 419,313

The grants receivable have been discounted to their net present value using a 1.92% and 2.33% discount rate as of June 30, 2019 and 2018, respectively.

As of June 30, 2019 and 2018, approximately 78% and 88% of the Foundation's accounts and grants receivable were due from four donors, respectively.

9. ACCOUNTS PAYABLE AND ACCRUED EXPENSES

Accounts payable and accrued expenses are comprised of the following as of June 30:

	2019	2018
Accrued salaries and benefits	64%	49%
Payable to vendors - operation	29	25
Payable to vendors - construction	7	26
	100%	100%

10. NOTE PAYABLE TO A BANK

The School has a revolving line of credit agreement with a bank with a maximum borrowing of $1,000,000. Borrowings under this agreement bear interest at the bank base rate (5.50% and 5.00% at June 30, 2019 and 2018, respectively). There were no amounts outstanding at June 30, 2019 and 2018. The revolving line of credit agreement expires in April 2020 and is secured by assets of the School as specified in the agreement.

11. NEW MARKET TAX CREDIT

During fiscal year 2012, the School, through EBRC and the Foundation, embarked on a series of transactions to effectuate a New Markets Tax Credit (NMTC) structure to assist with the construction of the East Boston Property. The involvement of NMTC allowed for larger net proceeds than would otherwise be available under classic financing thereby producing a public benefit greater than would otherwise be achieved. The Foundation loaned the proceeds of bonds payable (see Note 12, Series 2011A QZAB and 2011B Revenue Bonds) and a portion of capital campaign proceeds, all totaling $6,283,999 (under three separate note receivable agreements) (see Note 14) to Chase NMTC Excel Investment Fund, LLC (the Investment Fund), who loaned the funds, along with a capital contribution totaling $2,486,001, net of transaction costs, to the Partnership of Hope 1, LLC (the Sub CDE). The Sub CDE ultimately loaned the funds to EBRC (see Note 13, QLICI Loans A through D) for use with the East Boston Property building project.

The Sub CDE received allocations of NMTC pursuant to Section 45D of the IRC in order to assist eligible businesses in making investments in certain low-income communities. The availability of NMTC allowed Chase Community Equity, LLC (the Investor) to invest $2,486,001 in Chase NMTC Excel Investment LLC.

In September 2018, the NMTC deal unwound. The Investor exercised its put option and, as a result, the Foundation purchased the Investor's interest in the Investment Fund for $1,000 and took ownership of the Investment Fund. Also, as part of the unwind, the Sub CDE assigned the four QLICI Loans A through D (see Note 13) to the Investment Fund. In October 2018, the Foundation dissolved the Investment Fund.

In October 2018, EBRC authorized a deed transfer of the East Boston Property to the Foundation in satisfaction of the four QLICI Loans A through D, and assigned its capital lease with the School to the Foundation (see Note 4). The Foundation then provided a mortgage interest on the East Boston Property to the financial institution which is the trustee of its bonds payable (see Note 12) to secure the bonds payable. EBRC dissolved in fiscal year 2019.

The below table summarizes the components of the net gain (loss) on unwind in the accompanying combined statement of revenues, expenses and changes in net position for the year ended June 30, 2019:

	Foundation	EBRC	Total
Gain on exercising put option, net of $1,000 option price	$ 1,960,001	$ -	$ 1,960,001
Excess of lease receivable assigned over notes payable, resulting in gain (loss)	324,016	(324,016)	-
Gain (loss) on forgiveness of intercompany due (to) from	(16,564)	16,564	-
Net gain (loss) on unwind	$ 2,267,453	$ (307,452)	$ 1,960,001

12. BONDS PAYABLE

Bonds payable consist of the following at June 30:

	Entity	2019	2018
Series 2011A QZAB	Foundation	$ 4,065,796	$ 4,181,306
Series 2011B Revenue Bonds	Foundation	-	261,396
Total Foundation bonds payable		4,065,796	4,442,702
Series 2015 Revenue Bonds	School	15,990,316	16,428,583
Total bonds payable		20,056,112	20,871,285
Less - current portion		569,026	561,762
Total bonds payable, net of current portion		$ 19,487,086	$ 20,309,523

Qualified Zone Academy Bonds - Series 2011A QZAB

On September 1, 2011, the Foundation entered into a loan and trust agreement with Massachusetts Development Finance Agency (MDFA), as issuer, and a financial institution, as trustee, to issue $4,700,000 of MDFA Qualified Zone Academy Revenue Bonds (QZAB), Series 2011A (Series 2011A QZAB). The proceeds from these bonds were loaned to the Investment Fund (see Notes 11 and 14, NMTC Note A). The Investment Fund used the proceeds from this loan to make an equity contribution to the Partnership of Hope, LLC (Sub CDE). The Sub CDE ultimately used the proceeds from this note to make a loan amounting to $4,700,000 to EBRC for the purpose of financing the acquisition and rehabilitation of the East Boston Property (see Note 13, QLICI Loan A). The bonds bore interest at 4.75% through October 2018. Commencing in October 2018 through the bonds' maturity date of September 2026, the rate was adjusted to 5.71%. The Foundation is required to pay monthly installments of principal and interest to the financial institution, which is appointed as trustee by MDFA. Interest payments of $228,653 and $204,472 were made in fiscal years 2019 and 2018, respectively, and are included in interest expense in the accompanying combined statements of revenues, expenses and changes in net position.

The Foundation is reimbursed for a percentage of the interest expense on the Series 2011A QZAB by the U.S. Department of the Treasury under the QZAB program. During the fiscal years ended June 30, 2019 and 2018, the Foundation was reimbursed $174,952 and $179,255, respectively, which is included in interest and other income in the accompanying combined statements of revenues, expenses and changes in net position.

The bonds are secured by substantially all assets of the Foundation and are guaranteed by the School. Beginning in October 2018, the bonds are also secured by the East Boston Property (see Note 11). Prepayment penalties range from 0% to 2% based on specific dates as outlined in the agreement.

12. **BONDS PAYABLE** (Continued)

Revenue Bonds - Series 2011B Revenue Bonds

On September 1, 2011, the Foundation entered into a loan and trust agreement with MDFA, as issuer, and a financial institution, as trustee, to issue $300,000 of MDFA Revenue Bonds, Series 2011B (Series 2011B Revenue Bonds). The proceeds from these bonds were loaned to the Investment Fund (see Note 14, Note B). The Investment Fund used the proceeds from this loan to make an equity contribution to the Sub CDE. The Sub CDE ultimately used the proceeds from this note to make a loan amounting to $300,000 to EBRC for the purpose of financing the acquisition and rehabilitation of the East Boston Property (see Note 13, QLICI Loan B). The bonds bore interest at 3.5% through October 2018. Commencing in October 2018 through the bonds' maturity date of September 2026, the rate was adjusted to 4.46%. The Foundation fully repaid the bond payable balance in April 2019.

The Foundation was required to pay monthly installments of principal and interest to the financial institution which was appointed as trustee by MDFA. Interest payments of $8,484 and $9,443 were made in fiscal years 2019 and 2018, respectively, and are included in interest expense in the accompanying combined statements of revenues, expenses and changes in net position. The bonds were secured by substantially all assets of the Foundation and were guaranteed by the School. The bonds were also secured by the East Boston Property (see Note 11). Prepayment penalties ranged from 0% to 2% based on specific dates in the agreement. No prepayment penalties were assessed when the Foundation repaid the note in April 2019.

Revenue Bonds - Series 2015 Revenue Bonds

On April 30, 2015, the School entered into a loan and trust agreement with MDFA, as issuer, and a financial institution, as trustee, to issue $16,500,000 of MDFA Revenue Bonds, Series 2015 (Series 2015 Revenue Bonds). The proceeds of these bonds were loaned to BSRC (see Note 14). The bonds bear interest at 3.2% through May 2025, at which point the interest rate will be adjusted as specified in the bond agreement. Under this agreement, the School pays monthly interest-only installments through April 2018. Beginning in May 2018, the School is required to pay monthly installments of principal and interest through maturity, April 2030. Interest expense was $526,349 and $535,218 for the years ended June 30, 2019 and 2018, respectively, and is included in interest expense in the accompanying combined statements of revenues, expenses and changes in net position. The bonds are secured by substantially all assets of the School and BSRC and are guaranteed by the Foundation and BSRC. Prepayment penalties range from 0% to 3% based on specific dates in the agreement.

The Organization must comply with various covenants as defined in the bond agreements. The Organization was in compliance with these covenants at June 30, 2019 and 2018.

Future minimum payments on the bonds payable are as follows:

Fiscal Year	Principal	Interest
2020	$ 569,026	$ 746,548
2021	$ 592,954	$ 726,984
2022	$ 615,813	$ 699,759
2023	$ 639,624	$ 675,948
2024	$ 662,629	$ 652,943
2025 – 2029	$ 6,238,586	$ 2,399,787
2030	$ 10,737,480	$ 283,018

13. NOTES PAYABLE AND INTERCOMPANY NOTES PAYABLE

Notes Payable

Notes payable are comprised of the following at June 30:

	Entity	2019	2018
QLICI Loan A	EBRC	$ -	$ 4,700,000
QLICI Loan B	EBRC	-	300,000
QLICI Loan C	EBRC	-	1,283,999
QLICI Loan D	EBRC	-	1,961,001
Total EBRC notes payable		-	8,245,000
Local Initiatives Support Corporation (LISC)	School	3,629,929	3,733,339
Pacific Charter School Development, Inc. (PCSD)	School	1,500,000	1,500,000
Total School notes payable		5,129,929	5,233,339
Total notes payable		5,129,929	13,478,339
Less - current portion		109,570	228,759
Total notes payable, net of current portion		$ 5,020,359	$ 13,249,580

Notes Payable - EBRC

QLICI Loan A

During 2011, EBRC entered into a loan agreement for $4,700,000 with Partnership of Hope 1, LLC (the Sub CDE, see Note 11) under the QLICI program. This note bore interest at 2.35% and was to mature in September 2051. This note was due in quarterly interest-only payments through September 2018, at which time principal and interest were to be due in accordance with a set schedule as defined in the note agreement through September 2051. The note was secured by a shared first mortgage on the East Boston Property.

QLICI Loan B

During 2011, EBRC entered into a loan agreement for $300,000 with Partnership of Hope I, LLC under the QLICI program. This note bore interest at 2.35%. This note was due in quarterly interest-only payments through September 2018, at which time principal and interest were to be due in accordance with a set schedule as defined in the note agreement through September 2051. The note was secured by a shared first mortgage on the East Boston Property.

QLICI Loan C

During 2011, EBRC entered into a loan agreement for $1,283,999 with Partnership of Hope 1, LLC under the QLICI program. This note bore interest at 2.35%. This note was due in quarterly interest-only payments through September 2018, at which time principal and interest were to be due in accordance with a set schedule as defined in the note agreement through September 2051. The note was secured by a shared second mortgage on the East Boston Property.

13. NOTES PAYABLE AND INTERCOMPANY NOTES PAYABLE (Continued)

Notes Payable - EBRC (Continued)

QLICI Loan D

During 2011, EBRC entered into a loan agreement for $1,961,001 with Partnership of Hope 1, LLC under the QLICI program. This note bore interest at 2.35%. This note was due in quarterly interest-only payments through September 2018, at which time principal and interest were to be due in accordance with a set schedule as defined in the note agreement through September 2051. The note was secured by a shared second mortgage on the East Boston Property.

Interest payments of $55,154 and $193,517 were made on QLICI Loans A through D in fiscal years 2019 and 2018, respectively.

As part of the NMTC unwind in September 2018 (see Note 11), the Sub CDE assigned QLICI Loans A through D to the Investment Fund. In October 2018, EBRC authorized a deed transfer of the East Boston Property to the Foundation in satisfaction of QLICI Loans A through D.

Notes Payable - School

Local Initiatives Support Corporation

In August 2013, the School entered into a $4,500,000 note payable agreement with a nonprofit corporation, Local Initiatives Support Corporation (LISC). The note bore interest at 5.8% per annum and required interest-only payments through May 2018. The School began paying monthly principal and interest payments of $26,435 in May 2018 and will continue to do so through May 2025, with a balloon payment amounting to approximately $2,918,000 due at the note's maturity (May 1, 2025). The School also paid $750,000 of additional principal during fiscal year 2018. This note was used to fund BSRC Note B (see Note 14). Interest expense on this note was $213,814 and $245,654 for the years ended June 30, 2019 and 2018, respectively. This note is secured by a second mortgage on the High School Property (see Note 1).

Pacific Charter School Development, Inc. **(PCSD)**

In 2015, the School entered into a $1,500,000 note payable agreement with a nonprofit corporation, Pacific Charter School Development, Inc. (PCSD). The note bears interest at 1% per annum. All principal and accrued interest are due at the earlier of the School refinancing all or a portion of the Series 2015 Revenue Bonds or September 1, 2022, the note's maturity. This note was used to fund BSRC Note C (see Note 14). Interest expense on this note was $15,000 for each of the years ended June 30, 2019 and 2018. This note is unsecured. Accrued interest on the note was $60,000 and $45,000 as of June 30, 2019 and 2018, respectively.

13. **NOTES PAYABLE AND INTERCOMPANY NOTES PAYABLE** (Continued)

Future Minimum Payments – Notes Payable

Future minimum payments on notes payable are as follows:

	Principal	Interest
2020	$ 109,570	$ 207,654
2021	$ 116,097	$ 201,127
2022	$ 123,012	$ 194,211
2023	$ 1,630,340	$ 300,551
2024	$ 138,104	$ 179,120
2025	$ 3,012,806	$ 143,003

The notes payable contain various covenants and restrictions with which the School and EBRC, before its dissolution, must comply. The School was in compliance with these covenants at June 30, 2019. EBRC and the School were in compliance with these covenants at June 30, 2018.

Intercompany Notes Payable – School Loans A, B and C

Intercompany notes payable are comprised of the following at June 30:

	Entity	2019	2018
School Loan A	BSRC	$ 15,990,316	$ 16,428,583
School Loan B	BSRC	3,629,929	3,733,339
School Loan C	BSRC	1,500,000	1,500,000
Net proceeds		21,120,245	21,661,992
Less - current portion		560,595	541,424
Total intercompany notes payable, net of current portion		$ 20,559,650	$ 21,120,498

School Loan A

During April 2015, the School and BSRC entered into a promissory note agreement whereby the School loaned BSRC $16,500,000 of proceeds from the Series 2015 Revenue Bonds (see Note 14, BSRC Note A) for closing costs and the acquisition and improvements of the High School Property (see Notes 1 and 7). The note bears interest at 3.2% per annum. Under this agreement, the School paid monthly interest-only installments through April 2018. Beginning in May 2018, BSRC began paying monthly installments of principal and interest through maturity, April 2030.

Interest expense of $526,349 and $535,218 is included in intercompany interest expense (revenue) - notes in the accompanying combined statements of revenues, expenses and changes in net position for the years ended June 30, 2019 and 2018, respectively.

13. NOTES PAYABLE AND INTERCOMPANY NOTES PAYABLE (Continued)

Intercompany Notes Payable – School Loans A, B and C (Continued)

School Loan B

During April 2015, the School and BSRC entered into a promissory note agreement whereby the School loaned BSRC $4,500,000 (see Note 14, BSRC Note B) of proceeds from the LISC note for closing costs and the acquisition and improvements of the High School Property. The note bears interest at 5.8% per annum and had monthly interest-only payments through April 2018. Beginning in May 2018, BSRC began paying monthly installments of principal and interest of $26,435 through maturity, May 2025. BSRC also paid $750,000 of additional principal during fiscal year 2018.

Interest expense of $213,814 and $245,654 is included in intercompany interest expense (revenue) - notes in the accompanying combined statements of revenues, expenses and changes in net position for the years ended June 30, 2019 and 2018, respectively.

School Loan C

During April 2015, the School and BSRC entered into a promissory note agreement whereby the School loaned BSRC $1,500,000 (see Note 14, BSRC Note C) of proceeds from the PCSD note for closing costs and the acquisition and improvements of the High School Property. The note bears interest at 1% per annum. All principal and accrued interest are due at the earlier of the School refinancing all or a portion of the Series 2015 Revenue Bonds or September 1, 2022, the note's maturity.

Interest expense of $15,000 per year is included in intercompany interest expense (revenue) - notes in the accompanying combined statements of revenues, expenses and changes in net position for the years ended June 30, 2019 and 2018.

Future Minimum Payments – Intercompany Notes Payable – School Loans A, B and C

Future minimum payments on intercompany notes payable are as follows for the years ending June 30:

	Principal	Interest
2020	$ 560,595	$ 721,245
2021	$ 583,388	$ 702,817
2022	$ 605,691	$ 676,147
2023	$ 2,128,915	$ 766,592
2024	$ 651,858	$ 629,982
2025 – 2029	$ 5,852,318	$ 2,126,568
2030	$ 10,737,480	$ 283,018

14. NOTES RECEIVABLE AND INTERCOMPANY NOTES RECEIVABLE

Notes Receivable – NMTC Notes A, B and C

Notes receivable are comprised of the following at June 30, 2018:

	Entity	
NMTC Note A	Foundation	$ 4,700,000
NMTC Note B	Foundation	300,000
NMTC Note C	Foundation	1,283,999
Total notes receivable		$ 6,283,999

The Foundation provided the Investment Fund (see Note 11) with three 2.24% interest loans totaling $6,283,999. The Foundation utilized the proceeds from the Series 2011A QZAB and Series 2011B Revenue Bonds (see Note 12) and a portion of capital campaign proceeds to make these loans. The Investment Fund utilized the proceeds from these loans to make three separate equity investments to Partnership of Hope I, LLC. Partnership of Hope I, LLC used the proceeds from these investment loans to make three separate loans (QLICI Loans A, B and C) to EBRC (see Note 13).

For the portion of the notes receivable relating to Notes A and B, interest-only payments were due beginning in December 2011 through November 2018. Commencing in December 2018 through September 2044, principal and interest payments were due in the amount defined in the agreement. For the portion of the note receivable relating to Note C, interest-only payments were due beginning in December 2011 through November 2044. Commencing December 2044 through September 2049, principal and interest payments were due in the amount defined in the agreement.

For the years ended June 30, 2019 and 2018, the Foundation was paid $32,984 and $141,004, respectively, in interest payments, which is included in interest and other income in the accompanying combined statements of revenues, expenses and changes in net position. At June 30, 2018, $35,251 of interest receivable was included in current portion of accounts and grants receivable in the accompanying combined statement of net position.

As part of the NMTC unwind that occurred in September 2018, as described in Note 11, the Foundation purchased the interest and became the sole member of the Investment Fund. The Investment Fund was dissolved in October 2018. The note receivables were forgiven as part of the NMTC unwind.

Intercompany Notes Receivable – BSRC Notes A, B and C

In connection with the purchase of land and construction of the High School Property (see Note 1) in East Boston, Massachusetts, the School, as bond owner, entered into certain bond payable agreements with MDFA and a bank (see Note 12). The School also entered into certain note agreements (see Note 13). With the proceeds of these bonds and notes, the School entered into promissory note agreements with BSRC.

14. NOTES RECEIVABLE AND INTERCOMPANY NOTES RECEIVABLE (Continued)

Intercompany Notes Receivable – BSRC Notes A, B and C (Continued)

Intercompany notes receivable are comprised of the following at June 30:

	Entity	2019	2018
BSRC Note A	School	$ 15,990,316	$ 16,428,583
BSRC Note B	School	3,629,929	3,733,339
BSRC Note C	School	1,500,000	1,500,000
Total		21,120,245	21,661,992
Less - current portion		560,595	541,424
Total intercompany notes receivable, net of current portion		$ 20,559,650	$ 21,120,498

The terms of these notes are the same as the underlying direct loan agreements with MDFA, LISC and PCSD (see Notes 12 and 13) as follows:

BSRC Note A

This note was funded with proceeds from Series 2015 Revenue Bonds (see Note 12). Borrowing and terms under this agreement mirror those of the bond as described in Note 12.

BSRC Note B

This note was funded with proceeds from the LISC note payable (see Note 13). This note allows for borrowings up to $4,500,000 under the same terms as the LISC note as defined in Note 13.

BSRC Note C

This note was funded with proceeds from the PCSD note payable (see Note 13). Borrowings and terms under this agreement mirror those of the PCSD note as described in Note 13.

Future Minimum Receipts

Future minimum principal and interest receipts on intercompany notes receivable are due as follows for the years ending June 30:

	Principal	Interest
2020	$ 560,595	$ 721,245
2021	$ 583,388	$ 702,817
2022	$ 605,691	$ 676,147
2023	$ 2,128,915	$ 766,592
2024	$ 651,858	$ 629,982
2025 – 2029	$ 5,852,318	$ 2,126,568
2030	$ 10,737,480	$ 283,018

15. PROFESSIONAL DEVELOPMENT

The School incurred expenditures for the purpose of providing professional development to staff and teachers. The School expended $101,044 and $97,650 for the years ended June 30, 2019 and 2018, respectively, which are reflected as staff development in the accompanying combined statements of revenues, expenses and changes in net position.

16. RESTRICTED CASH

The Organization is required to maintain certain escrow funds on deposit with a trustee pursuant to its note agreements and bond agreements (see Notes 12 and 13). These funds are invested in checking and money market accounts. Restricted cash consists of the following at June 30:

	Entity	2019	2018
Debt service reserve – 2015	School	$ 982,617	$ 971,628
Debt service reserve - 2011	Foundation	136,143	134,620
Restricted cash - capital	Foundation	979,500	100,000
Total Foundation		1,115,643	234,620
Operating expense reserves	EBRC	-	15,707
Asset management reserve	EBRC	-	7,778
Total EBRC		-	23,485
Restricted reserves		$ 2,098,260	$ 1,229,733

- Debt service reserve - 2015 - During fiscal year 2015, in accordance with the Series 2015 Revenue Bonds (see Note 12), the School deposited $964,680 into a debt service account.

- Debt service reserve - 2011 - Pursuant to the Series 2011A QZAB and Series 2011B Revenue Bonds (see Note 12), the Foundation is required to maintain a debt service account with the Bond Trustee. The debt service account is to be used for payment of principal and redemption of the bonds.

- Restricted cash - capital - This is cash received and not yet spent by the Foundation for capital purposes (see Note 2).

- Operating expense reserves - Established to ensure the payment of a portion of interest relating to QLICI Loans A and B (see Note 13), as well as paying the lender for certain annual compliance costs as defined in the agreement. EBRC made an initial deposit of $150,000 into this account. Interest payments totaling $13,397 and $10,000 were transferred from this account in fiscal years 2019 and 2018, respectively. EBRC also made payments of $10,000 out of this account during the year ended June 30, 2018, related to the annual compliance fee as defined in the agreement. As part of the NMTC unwind that occurred in September 2018, as described in Note 11, the remaining cash was transferred to EBRC's operating cash account and used for EBRC expenses and the reserve account was closed.

16. RESTRICTED CASH (Continued)

- Asset management reserve - Established to ensure the payment of a portion of interest relating to QLICI Loans A and B (see Note 13) as defined in the agreement. The annual disbursements to pay the aforementioned interest total $42,500 and are disbursed by EBRC on a quarterly basis. Interest payments totaling $7,778 and $42,500 were transferred from this account during fiscal years 2019 and 2018, respectively. As part of the NMTC unwind that occurred in September 2018, as described in Note 11, the account was closed.

The reserve accounts are properly funded in accordance with the applicable agreements as of June 30, 2019 and 2018.

17. CUMULATIVE SURPLUS REVENUE

Effective July 1, 2010, any cumulative surplus revenue generated by the School must comply with M.G.L.c.71. Section 89 (as amended by Chapter 12 of the Acts of 2010 under Section 8 (hh)). In accordance with this legislation and subsequent DESE regulations, if the School's cumulative surplus revenue, as defined, exceeds 20% of its operating budget and its budgeted capital costs for the succeeding fiscal year, the amount in excess of said 20% shall be returned to the sending district or districts and the state in proportion to its share of tuition paid during the fiscal year.

As of June 30, 2019 and 2018, the cumulative surplus revenue was less than 20%; however, the calculation is subject to DESE review and approval. Management does not anticipate any material change in the calculation.

18. CONDITIONAL GRANT

During fiscal year 2019, a foundation awarded the Foundation a grant for up to $350,000 over ten years, which is restricted for certain programming. The first $35,000 of this grant was received and recognized as revenue during fiscal year 2019. The remaining balance of up to $315,000 of the grant at June 30, 2019, up nine years at $35,000 per year, is conditional upon annual approval by the foundation, and accordingly, is not reflected in the accompanying combined general purpose financial statements at June 30, 2019.

19. RECLASSIFICATION

Certain amounts in the June 30, 2018 combined general purpose financial statements have been reclassified to conform with the June 30, 2019 combined presentation.

EXCEL ACADEMY CHARTER SCHOOL,
FRIENDS OF EXCEL ACADEMY CHARTER SCHOOLS, INC.,
EXCEL ACADEMY EAST BOSTON REALTY CORPORATION AND
EXCEL ACADEMY BREMEN STREET REALTY CORPORATION

Schedule of Expenditures of Federal Awards
For the Year Ended June 30, 2019

Federal Grantor/ Pass-Through Grantor/ Program or Cluster Title	Federal CFDA Number	Pass-Through Entity Identifying Number	Federal Expenditures
U.S. Department of Education:			
Pass-through the Commonwealth of Massachusetts, Department of Elementary and Secondary Education:			
Title I Grants to Local Educational Agencies	84.010	305-239293-2019-0410	$ 577,811
Special Education - Grants to States (Special Education Cluster (IDEA))	84.027	240-247777-2019-0410	398,303
English Language Acquisition State Grants	84.365A	180-239292-2019-0410	25,358
Supporting Effective Instruction State Grants (formerly Improving Teacher Quality State Grants)	84.367	140-239290-2019-0410	75,057
Student Support and Academic Enrichment Program	84.424	309-239291-2019-0410	46,251
Total Department of Elementary and Secondary Education			1,122,780
U.S. Department of Agriculture:			
Passed-through Commonwealth of Massachusetts, Department of Elementary and Secondary Education:			
National School Lunch Program (Child Nutrition Cluster)	10.555	SCDOE19758Z SCDOE19758T SCDOE19758C	528,294
Total Expenditures of Federal Awards			$ 1,651,074

Note 1. **Basis of Presentation**

The accompanying Schedule of Expenditures of Federal Awards includes the Federal assistance activity of the Organization and is presented on the accrual basis of accounting. The information in this schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.*

Note 2. The Organization has elected not to use the 10% de minimis cost rate for its Federal programs.

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Report on Internal Control Over Financial Reporting and on Compliance and Other Matters Based on an Audit of Combined General Purpose Financial Statements Performed in Accordance With Government Auditing Standards

Independent Auditor's Report

To the Boards of Trustees of
Excel Academy Charter School,
Friends of Excel Academy Charter Schools, Inc. and
Excel Academy Bremen Street Realty Corporation:

We have audited, in accordance with the auditing standards generally accepted in the United States of America and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States, the combined general purpose financial statements of Excel Academy Charter School, Friends of Excel Academy Charter Schools, Inc., Excel Academy East Boston Realty Corporation and Excel Academy Bremen Street Realty Corporation (collectively, the Organization), which comprise the combined statement of net position as of June 30, 2019, and the related combined statements of revenues, expenses and changes in net position and cash flows for the year then ended, and the related notes to the combined general purpose financial statements, and have issued our report thereon dated October 16, 2019.

Internal Control Over Financial Reporting

In planning and performing our audit of the combined general purpose financial statements, we considered the Organization's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the combined general purpose financial statements, but not for the purpose of expressing an opinion on the effectiveness of the Organization's internal control. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the Organization's combined general purpose financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

Compliance and Other Matters

As part of obtaining reasonable assurance about whether the Organization's combined general purpose financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of combined financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

Purpose of this Report

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the Organization's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the Organization's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

Alexander, Aronson, Finning & Co., P.C.

Westborough, Massachusetts
October 16, 2019

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Report on Compliance for Each Major Federal Program and Report on Internal Control Over Compliance Required by the Uniform Guidance

Independent Auditor's Report

To the Boards of Trustees of
Excel Academy Charter School,
Friends of Excel Academy Charter Schools, Inc. and
Excel Academy Bremen Street Realty Corporation:

Report on Compliance for Each Major Federal Program

We have audited the compliance of Excel Academy Charter School, Friends of Excel Academy Charter Schools, Inc., Excel Academy East Boston Realty Corporation and Excel Academy Bremen Street Realty Corporation (collectively, the Organization) with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on the Organization's major Federal program for the year ended June 30, 2019. The Organization's major Federal program is identified in the summary of auditor's results section of the accompanying schedule of findings and questioned costs.

Management's Responsibility

Management is responsible for compliance with the Federal statutes, regulations, and the terms and conditions of its Federal awards applicable to its Federal programs.

Auditor's Responsibility

Our responsibility is to express an opinion on compliance for the Organization's major Federal program based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with auditing standards generally accepted in the United States of America; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major Federal program occurred. An audit includes examining, on a test basis, evidence about the Organization's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for its major Federal program. However, our audit does not provide a legal determination of the Organization's compliance.

Opinion on Each Major Federal Program

In our opinion, the Organization complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on its major Federal program for the year ended June 30, 2019.

Report on Internal Control Over Compliance

Management of the Organization is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to on page 37. In planning and performing our audit of compliance, we considered the Organization's internal control over compliance with the types of requirements that could have a direct and material effect on the major Federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for the major Federal program and to test and report on internal control over compliance in accordance with Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the Organization's internal control over compliance.

A *deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a Federal program on a timely basis. A *material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a Federal program will not be prevented, or detected and corrected, on a timely basis. A *significant deficiency in internal control over compliance* is a deficiency, or a combination of deficiencies, in internal control over compliance with a type of compliance requirement of a Federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

Alexander, Aronson, Finning & Co., P.C.

Westborough, Massachusetts
October 16, 2019

1. SUMMARY OF AUDITOR'S RESULTS

Combined General Purpose Financial Statements

Type of auditor's report issued on whether the combined general purpose financial statements audited were prepared in accordance with GAAP: Unmodified

Is a "going concern" emphasis-of-matter paragraph included in the auditor's report? ____ Yes ___X___ No

Internal control over financial reporting:

- Material weakness(es) identified? ____ Yes ___X___ No
- Significant deficiency(ies) identified? ____ Yes ___X___ None reported

Noncompliance material to combined general purpose financial statements noted? ____ Yes ___X___ No

Federal Awards

Internal control over major Federal program:

- Material weakness(es) identified? ____ Yes ___X___ No
- Significant deficiency(ies) identified? ____ Yes ___X___ None reported

Type of auditor's report issued on compliance for the major Federal program: Unmodified

Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)? ____ Yes ___X___ No

Identification of major Federal program:

Name of Federal Program or Cluster	Federal CFDA Number
National School Lunch Program (Child Nutrition Cluster)	10.555

Dollar threshold used to distinguish between Type A and Type B programs: $750,000.

Auditee qualified as low-risk auditee? ___X___ Yes ____ No

2. COMBINED GENERAL PURPOSE FINANCIAL STATEMENT FINDINGS

None

3. FEDERAL AWARD FINDINGS AND QUESTIONED COSTS

None

Attachment 10: Draft Terms Sheet

Management Agreement Term Sheet

Draft

[Date]

This term sheet is solely intended as a summary of the basic understanding of the prospective working relationship between Excel Academy Charter Schools ("Excel"), a school management organization, and Excel Academy Rhode Island ("EA-RI"), a to-be-formed Rhode Island Mayoral Academy. It is understood that no party to this agreement is under a binding obligation to any other until an agreement acceptable to all parties has been executed.

Excel will undertake the functions specified in the final agreement regarding the academic, administrative and business services for EA-RI. EA-RI is responsible for the entire care, governance, management and control of EA-RI. EA-RI will retain the right and the duty of oversight of EA-RI pursuant to its charter and applicable law.

A. Responsibilities of Excel

1. **Education and Instruction-Related Services**
   a. Develop and implement EA-RI's educational programs and programs of instruction and provide guidance regarding EA-RI's implementation of such programs.
   b. Report on the educational progress of each student by analyzing the results of interim assessments and diagnostic tests administered by EA-RI.
   c. Develop a school-wide evaluation program.
   d. Develop a comprehensive program design forcollege and career readiness and socio-emotional growth and provide guidance to EA-RI regarding implementation of such program design.
   e. Assist with the acquisition of instructional and curricular materials, equipment and supplies for EA-RI.
   f. Support and assist with family outreach efforts.

2. **Business Operations**
   a. Manage, at the direction of EA-RI, the business function of EA-RI.
   b. At the direction of EA-RI, manage EA-RI's service providers (e.g., but not limited to, transportation, auditing, payroll, custodial and food services).
   c. At the direction of EA-RI, manage the acquisition of materials, supplies, and equipment for use at EA-RI (in accordance with approved budget, EA-RI's procurement policies, and applicable law).
   d. At the direction of EA-RI, arrange for contracts for any other services, such as, but not limited to, security or custodial services (in accordance with the approved budget, EA-RI's procurement policies, and applicable law).
   e. At the direction of EA-RI, manage EA-RI's marketing function, including, but not limited to, developing digital and other materials associated with EA-RI's

branding, and promoting EA-RI for the purposes of increasing student enrollment, fundraising, recruiting staff and for public relations.

f. At the direction of EA-RI, devise a fundraising strategy and conduct fundraising activities on behalf of EA-RI.
g. At the direction of EA-RI, design and assist with the implementation of student recruitment and enrollment procedures, including but not limited to the processing of student applications.
h. Assist EA-RI in preparing reports required to be submitted to the authorizer and other governmental authorities.
i. Assist with EA-RI's compliance with legal and reporting requirements.
j. At the direction of EA-RI, facilitate EA-RI's purchase and procurement of information technology equipment and services (in accordance with the approved budget, EA-RI's procurement policies, and applicable law).
k. At the direction of EA-RI, provide or arrange for a third-party provider to provide technology-related services to EA-RI (in accordance with the approved budget, EA-RI's procurement policies, and applicable law).
l. At the direction of EA-RI, provide for or arrange for a third-party to provide for before and after school programs (in accordance with the approved budget, EA-RI's procurement policies, and applicable law).
m. Periodically provide students, parents, faculty members and other School stakeholders with such written information or materials regarding EA-RI's programming.
n. At the request and direction of EA-RI, provide reports on the education, operational and financial performance of EA-RI.
o. At the direction of EA-RI, arrange for insurance coverage on behalf of EA-RI (in accordance with the approved budget, EA-RI's procurement policies, and applicable law).
p. Provide and manage EA-RI's facility.
q. Assist EA-RI in the selection of a food service and manage the service selected (in accordance with the approved budget, EA-RI's procurement policies, and applicable law).

3. **Human Resources and Employment**

a. Excel shall directly employ all of its employees necessary to carry out its functions contained herein including, but not limited to, the Chief Executive Officer, the Executive Principal, the Deputy Principal, the Dean of Students, the Dean of Curriculum and Instruction, the Dean of Student Supports, and the Dean of Operations. EA-RI, and not Excel, shall employ School faculty and staff (collectively "School Staff").
b. Assist with the recruitment, hiring, and onboarding of School Staff.
c. At the direction of EA-RI, assist with the supervision, evaluation, discipline, retention, and/or termination of School Staff.

d. At the direction of EA-RI, assist with the recruitment and screening efforts of School Staff and other personnel for EA-RI.
e. Provide general human resources services including, but not limited to, assisting administration with the selection and training of the administrative staff of EA-RI, determining staff needs, recommending the adoption of procedures for the hiring, supervision, discipline and termination of School Staff and other personnel policies and administrative procedures applicable to the staff.
f. At the direction of EA-RI, secure employee benefit plans and administer such plans (in accordance with the approved budget, EA-RI' procurement policies, and applicable law).

4. **Financial Services**
   a. Prepare an initial draft of EA-RI's annual budget.
   b. Provide financial management services in accordance with EA-RI's Financial Policies and Procedures.
   c. Prepare monthly and quarterly unaudited financial statements, including a monthly budget to actual reports.
   d. Cooperate with the auditors retained by EA-RI in preparation of annual audited financial statements of EA-RI.

B. **Responsibilities of EA-RI**
   a. **Service Fee**: EA-RI shall each pay Excel a service fee not to exceed fifteen percent (15%) of EA-RI's total local, state, and federal per pupil aid.
   b. **Access**: EA-RI shall provide Excel with access to all information necessary for Excel to carry out its responsibilities outlined above. Pursuant to the Family Educational Rights and Privacy Act and the Rhode Island Educational Records Bill of Rights, EA-RI agents, employees, and representatives shall be considered "school officials" within EA-RI that EA-RI has determined to have legitimate educational interests in certain student records.

C. **Financial Management**. Excel shall act as the custodian of the funds required for operating the EA-RI. At the direction of EA-RI, all funds shall be retained and expended in accordance with EA-RI's Financial Policies and Procedures.

D. **Termination Rights**.

1. **Termination by EA-RI**
   a. For cause upon material breach of Agreement by Excel with reasonable notice and cure periods.
   b. Upon an enactment, repeal, promulgation or withdrawal of any federal, State, or local law, regulation, or court or administrative decision or order which, after exhausting all possible appeals, results in a final judgment or finding that the Agreement or the operation of EA-RI in conformity with this Agreement, would

violate EA-RI's responsibilities, duties or obligations under the State or federal constitutions, statutes, laws, rules or regulations.

c. The authorizer revokes or fails to renew EA-RI's charter, or EA-RI's charter otherwise expire at any point prior to the expiration of the terms of this agreement. In such an instance, EA-RI may terminate this agreement upon ninety (90) days advance written notice to Excel.

2. **Termination by Excel**
   a. For cause upon material breach of Agreement by EA-RI with reasonable notice and cure periods.
   b. Upon enactment, repeal, promulgation or withdrawal of any federal, state, or local law, regulation, or court or administrative decision or order which, after exhausting all possible appeals, results in a final judgment or finding that the Agreement or the operation of EA-RI in conformity with the Agreement, would have a material adverse effect on Excel's ability to provide Services to EA-RI in accordance with its budget, the Agreement or the directives of Excel's Board of Directors.
   c. EA-RI refuses or willfully fails to follow any material direction of Excel related to the implementation of Excel's Services contemplated by the Agreement.
   d. The authorizer revokes or fails to renew EA-RI's charter, or EA-RI' charter otherwise expire at any point prior to the expiration of the terms of this agreement. In such an instance, Excel may terminate this agreement upon ninety (90) days advance written notice to EA-RI.

E. <u>Other Provisions</u>

a. Contract Oversight
b. Renewal Conditions
c. Representations and Warranties
d. Intellectual Property/Confidentiality
e. Dispute Resolution
f. Status of Charter Upon termination of Agreement: Should this Agreement terminate, such termination shall warrant the application for a major amendment to the charter with the Council on Elementary and Secondary Education. Excel Academy Rhode Island shall submit this application for a major amendment to the charter to the Council within ninety (90) days of the termination of the agreement, and only after Excel Academy Charter Schools' express, written approval. Excel Academy Rhode Island's failure to obtain a major charter amendment, deemed appropriate by Excel Academy Charter Schools in its sole discretion, within a reasonable time following application of the same, shall result in Excel Academy Rhode Island's obligation to relinquish its charter to the Council on a schedule dictated by Excel Academy Charter Schools.
g. Subcontracting

h. Indemnification

Attachment 11: Budget Projection

STATE OF RHODE ISLAND
CHARTER SCHOOL OPERATING BUDGET PROJECTIONS

Charter School: Excel Academy Rhode Island

		Implementation and Operations				
		FY2022 - pre	FY2023	FY2024	FY2025	FY2026
	MAJOR ASSUMPTIONS					
A	Average local aid per pupil	0.00	4,550.00	4,543.00	4,545.00	4,546.00
B	Average state aid per pupil	0.00	11,626.00	11,626.00	11,626.00	11,626.00
C	Student Enrollment	0	167	443	892	1,228
D	Gross Square Footage (GSF) of facility	0	20,875	55,375	111,500	153,500
E	*Staffing*					
	E1. School Principals/Asst Principals	1.0	1.0	1.0	1.0	1.0
	E2. School Support Staff	0.0	0.0	0.0	0.0	0.0
	E3. Executive Director/Superintendent	0.0	0.0	0.0	0.0	0.0
	E4. Deputies/Administrators	1.0	3.5	9.5	19.0	28.5
	E5. Program/Operations Support Staff	0.0	1.0	2.0	4.0	6.0
	E6. Teachers	0.0	10.5	28.5	57.5	79.5
	E7. Paraprofessionals	0.0	1.0	3.0	6.0	9.0
	E8. Pupil Support	0.0	5.0	12.0	24.0	33.0
	E9. Teacher Support	0.0	2.0	5.0	11.0	15.0
	E10. Program Management	0.0	0.0	0.0	0.0	0.0
	E11. Special Services	0.0	2.5	6.0	12.5	17.0
	E12. Facilities Maintenance	0.0	0.0	0.0	0.0	0.0
F	Staff FTE Subtotal:	2.0	26.5	67.0	135.0	189.0
	OPERATING REVENUES					
1	Local Revenue	0.00	759,873.00	2,012,760.00	4,053,869.00	5,582,167.00
2	State Revenue	0.00	1,941,507.33	5,157,286.67	10,370,045.26	14,277,684.35
3	Grants - Charter Schools Program	200,000.00	200,000.00	0.00	0.00	0.00
4	Grants - Private	400,000.00	141,657.17	300,782.95	302,554.05	520,718.58
5	Federal formula funds (inc. Title I, III and IDEA)	0.00	131,763.00	349,527.00	703,788.00	968,892.00
6	Capital Projects Funds	300,000.00	300,000.00	300,000.00	250,000.00	250,000.00
7	Other:	0.00	80,661.00	213,969.00	430,836.00	593,124.00
8	**TOTAL OPERATING REVENUES**	900,000.00	3,555,461.50	8,334,325.61	16,111,092.30	22,192,585.93
	OPERATING EXPENDITURES					
	School Management					
9	Salaries: Principals and Assistant Principals	185,000.00	185,000.00	185,000.00	185,000.00	185,000.00
10	Salaries: Support Staff	0.00	0.00	0.00	0.00	0.00
11	School Office	0.00	22,211.00	58,919.00	118,636.00	163,324.00
12	Other:	0.00	0.00	0.00	0.00	0.00
13	Subtotal:	185,000.00	207,211.00	243,919.00	303,636.00	348,324.00
	Program/Operations Management					
14	Salaries: Executive Director or Superintendent	0.00	0.00	0.00	0.00	0.00
15	Salaries: Deputies and Administrators	80,000.00	295,000.00	790,000.00	1,580,000.00	2,415,000.00
16	Salaries: Support Staff	0.00	45,000.00	90,000.00	180,000.00	270,000.00
17	Legal	60,000.00	0.00	0.00	0.00	0.00
18	School Board	12,000.00	0.00	0.00	0.00	0.00
19	Business Operations	90,000.00	0.00	0.00	0.00	0.00
20	Information Management and Technology	0.00	45,591.00	120,939.00	243,516.00	335,244.00
21	Other:	0.00	0.00	0.00	0.00	0.00
22	Subtotal:	242,000.00	385,591.00	1,000,939.00	2,003,516.00	3,020,244.00
	Instruction					
23	Salaries: Teachers	0.00	638,610.00	1,731,690.00	3,491,860.00	4,825,740.00
24	Salaries: Paraprofessionals	0.00	35,000.00	105,000.00	210,000.00	315,000.00
25	Stipends and Bonuses	0.00	0.00	0.00	0.00	0.00
26	Pupil-Use Technology, Hardware, and Software	0.00	18,537.00	49,173.00	74,259.00	102,231.00
27	Instructional Materials Supplies	0.00	34,903.00	92,587.00	186,428.00	256,652.00
28	Other: Summer School	0.00	10,187.00	27,023.00	54,412.00	74,908.00
29	Subtotal:	0.00	737,237.00	2,005,473.00	4,016,959.00	5,574,531.00
	Instructional Support					
30	Salaries: Pupil Support	0.00	280,000.00	672,000.00	1,344,000.00	1,848,000.00

31	Salaries: Teacher Support		0.00	76,000.00	198,000.00	434,000.00	594,000.00
32	Salaries: Program Management		0.00	0.00	0.00	0.00	0.00
33	Salaries: Special Services		0.00	132,500.00	318,000.00	662,500.00	901,000.00
34	Guidance and Counseling		0.00	0.00	0.00	0.00	0.00
35	Library and Media		0.00	2,171.00	5,759.00	11,596.00	15,964.00
36	Extracurricular		0.00	56,112.00	148,848.00	299,712.00	412,608.00
37	Student Services, Outreach, Recruitment		60,000.00	6,179.00	16,391.00	33,004.00	45,436.00
38	Student Health Services		0.00	2,004.00	5,316.00	10,704.00	14,736.00
39	Academic Interventions		0.00	35,404.00	93,916.00	189,104.00	260,336.00
40	Curriculum Development		12,000.00	4,342.00	11,518.00	23,192.00	31,928.00
41	In Service, Staff Development, and Support		0.00	18,370.00	48,730.00	98,120.00	135,080.00
42	Assessment		0.00	7,014.00	18,606.00	37,464.00	51,576.00
43	Other:		0.00	0.00	0.00	0.00	0.00
44		Subtotal:	72,000.00	620,096.00	1,537,084.00	3,143,396.00	4,310,664.00
	Operations						
45	Salaries: Facilities Maintenance		0.00	0.00	0.00	0.00	0.00
46	Transportation		0.00	146,960.00	389,840.00	784,960.00	1,080,640.00
47	Food Services		0.00	115,230.00	305,670.00	615,480.00	847,320.00
48	Safety		0.00	11,690.00	31,010.00	62,440.00	85,960.00
49	Building Upkeep and Maintenance		0.00	146,960.00	389,840.00	784,960.00	1,080,640.00
50	Maintenance Contracts		0.00	0.00	0.00	0.00	0.00
51	Utilities		0.00	55,110.00	146,190.00	294,360.00	405,240.00
52	Lease		0.00	0.00	0.00	0.00	0.00
53	Debt Service		0.00	0.00	0.00	0.00	0.00
54	Capital Projects		300,000.00	300,000.00	300,000.00	300,000.00	300,000.00
55	Other:		0.00	21,042.00	55,818.00	112,392.00	154,728.00
56		Subtotal:	300,000.00	796,992.00	1,618,368.00	2,954,592.00	3,954,528.00
	Other Obligations						
57	Fringe Benefits		29,150.00	185,582.10	449,865.90	889,609.60	1,248,911.40
58	Insurance (non-employee)		0.00	0.00	0.00	0.00	0.00
59	Retiree Benefits		0.00	0.00	0.00	0.00	0.00
60	Purchased Management Services		0.00	396,640.07	1,015,142.44	1,966,601.29	2,603,592.92
61	Other: Depreciation		0.00	30,895.00	81,955.00	165,020.00	227,180.00
62		Subtotal:	29,150.00	613,117.17	1,546,963.34	3,021,230.89	4,079,684.32
	Community Services						
63	Community Service Operations		0.00	0.00	0.00	0.00	0.00
64	Other:		0.00	0.00	0.00	0.00	0.00
65		Subtotal:	0.00	0.00	0.00	0.00	0.00
66	**Budgeted Contingencies**		36,000.00	142,218.46	291,701.40	483,332.77	665,777.58
67	**TOTAL OPERATING EXPENDITURES**		864,150.00	3,502,462.63	8,244,447.74	15,926,662.66	21,953,752.90
68	**SURPLUS/(DEFICIT)**		35,850.00	52,998.87	89,877.87	184,429.64	238,833.04

Attachment 12: Draft School Calendar

EXCEL ACADEMY CHARTER SCHOOLS

EXCEL ACADEMY CHARTER SCHOOLS

Sample Academic Year Calendar

August - 9 days

Su	M	Tu	W	Th	F	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

September- 20 days

Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

October - 21 days

Su	M	Tu	W	Th	F	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	29	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

November - 17 days

Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

December - 15 days

Su	M	Tu	W	Th	F	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

January -20 days

Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

February-15 dats

Su	M	Tu	W	Th	F	Sa
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29

March - 22 days

Su	M	Tu	W	Th	F	sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

April -15 days

Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

May - 20 days

Su	M	Tu	W	Th	F	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

June - 15 days

Su	M	Tu	W	Th	F	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

July

Su	M	Tu	W	Th	F	Sa
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

KEY

End of Quarter

New Staff Orientation

Staff Summit & PD Days (no school)

Summer School

Vacations and holidays (no school)

11:30 dismissal

11:30 dismissal, Family Conferences

Regular Fridays 1:30 dismissal

IMPORTANT DATES			
August 1-8	New Staff Orientation (7 days)	December 19	PD: 11:30 Dismissal
August 8	*Open Building Day for Returning Staff (Optional)*	December 20	Pre-Winter Recess 11:30 Dismissal
August 9-19	Staff Summit (8 days)	Dec 23-Jan 1	Winter Recess: No School
August 13	Parent Orientation 6pm	January 17	End of Quarter 2, Network PD: No School
August 14	Parent Orientation 6pm	January 20	Martin Luther King, Jr Day: No School
August 15	Parent Orientation 6pm	January 21	PD (report card comments): 11:30 Dismissal
August 20	First Day of School - New Students	January 23	Report Cards & IEP Progress Reports Due 8AM
August 22	First Day of School - Returning Students	January 28	Qtr 2 Family Conferences: 11:30 Dismissal
August 23	PD: 11:30 Dismissal	January 29	PD (post-conference): 11:30 Dismissal
August 26	First Day of Academic Classes	February 14	Pre-February Recess 11:30 Dismissal
August 30	PD: 11:30 Dismissal	February 14	3rd Quarter Progress Reports
September 2	Labor Day: No School	February 17-21	February Recess: No School
September 19	Back to School Night	March 12	PD: 11:30 Dismissal
September 20	PD: 11:30 Dismissal	March 13	PD: 11:30 Dismissal
September 27	1st Quarter Progress Reports	March 26	PD: 11:30 Dismissal
October 11	PD: 11:30 Dismissal	March 27	End of Q3; PD (school-based): 11:30 Dismissal
October 14	Indigenous People's / Columbus Day: No School	April 1	PD (report card comments): 11:30 Dismissal
October 15	PD: No School	April 6	Report Cards & IEP Progress Reports Due 8AM
October 21	PD: No School	April 9	Qtr 3 Family Conferences: 11:30 Dismissal
October 25	End of Quarter 1	April 10	Good Friday: No School
October 29	PD (report card comments): 11:30 Dismissal	April 17	Pre-April Recess 11:30 Dismissal
October 31	Report Cards & IEP Progress Reports Due 8AM	April 20-24	Spring Recess: No School
November 1	PD: No School	April 29	PD: No School; Potential Snow Day Make-Up
November 7	Qtr 1 Family Conferences: 11:30 Dismissal	May 8	4th Quarter Progress Reports
November 8	PD (post-conference): 11:30 Dismissal	May 25	Memorial Day: No School
November 11	Veteran's Day: No School	May 29	PD: 11:30 Dismissal
November 26	PD: 11:30 Dismissal	June 15	PD: 11:30 Dismissal
November 27	Pre-Thanksgiving Holiday: 11:30 Dismissal	June 16	PD: 11:30 Dismissal
November 28-29	Thanksgiving Holiday: No School	June 17	PD: 11:30 Dismissal
December 6	2nd Quarter Progress Reports	June 18	End of Year Celebration Day
December 17	End of Quarter 2: Science & SS	June 19	Last Day of School (Students & Staff): 11:30 Dismissal
December 18	Gap Days Start, 8:00 am	June 19	Report Cards, IEP Prog Reports, EOY Checkout Due
		July 5-23	Summer School; Monday-Thursday